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# foreign agriculture circular

grains

Approved by the World Agricultural Outlook Board • USDA

SG 4-84
February 13, 1984

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## The USSR Grain Situation

Soviet grain purchases for delivery during the 1983/84 marketing year have risen to more than 25 million tons with wheat continuing to dominate. Reflecting recent large purchases from a number of origins, the estimate of Soviet wheat imports has been increased 1 million tons to a near-record 20 million. Most of the major wheat sellers participated in the Soviet business over the past month. The estimated 31 million tons of total grain imports mark the fourth consecutive year for Soviets imports of at least 30 million tons.

### Soviet Grain Import Estimate Increased

The estimate of 1983/84 Soviet grain imports has been increased to 31 million tons, reflecting a one-million-ton increase in wheat imports to 20 million. The estimate of coarse grain imports continues at 10 million tons with miscellaneous grains and rice accounting for the balance.

The Soviets appear to have about 90 percent of their projected wheat imports already covered but only around 80 percent of the coarse grains estimate. Wheat sales to the Soviets for 1983/84 have been heavy for all the major suppliers with the U.S. and Australia already reporting sales in excess of 1982/83 shipping levels. French and Argentine sales appear to be rapidly approaching the level of their 1982/83 shipments with only Canada still indicating sales well short of last year's level.

Soviet purchases of coarse grains have been modest over the past month. Although some recent reports indicate possible sales of new crop Argentine corn and sorghum of 1-1.5 million tons. The United States has been the largest seller to date followed by Argentina and Canada.

### Wheat Dominates Early-Season Soviet Imports

USSR grain imports during the first half of the 1983/84 marketing year are estimated at nearly 14 million tons, somewhat ahead of the pace for the same period a year ago, but well short of the record 20.8 million tons imported in July-December 1981. Wheat accounted for 2-of-every 3 tons that the Soviets imported for the July-December 1983 period.

## Domestic Use Estimate Raised

The estimate of 1983/84 domestic feed use has been increased by one million tons to 124 million, reflecting larger grain availabilities, an ambitious 1984 meat production target, and the likelihood that the Soviets may be using some of the favorably priced imported wheat for feed. Even with an increase in the wheat feeding estimate to 33 million tons, it still would be at the lowest level since 1976/77.

## U.S.-USSR Grain Trade Up

Through early February, the Soviets had purchased nearly 4.1 million tons of U.S. wheat and 3.9 million tons of corn for delivery during the first year of the new agreement (October 1, 1983-September 30, 1984). Wheat sales at this level already constitute the second largest U.S. shipment level since the first U.S.-USSR agreement went into effect in 1976/77.

## U.S.-USSR Grain Consultations Held

The United States and the USSR concluded the first session of the regular semiannual grain consultations for the first year of the new U.S.-USSR grain agreement. The current agreement calls for minimum annual shipments of 9 million tons, of which at least 4 million must be wheat, and 4 million corn. The Soviets have the option of satisfying the remaining 1 million tons by purchasing wheat, corn, soybeans, and/or soybean meal, with every ton of soybeans and meal purchased counting as 2 tons of grain. The Soviets may purchase up to a total of 12 million tons of wheat and/or corn without prior consultations.

At the recent consultations, the United States indicated that an additional 10 million tons of U.S. wheat and corn, would be available for sale by U.S. exporters to the Soviet Union for shipment during the current agreement year (October 1, 1983-September 30, 1984) without the necessity of further consultations.

## Livestock Sector Continues Strong

Record gains were made in the Soviet livestock sector in 1983 reflecting the mild 1982/83 winter, a vastly improved feed supply situation, and the probable response to the January 1983 boost in government prices for livestock products purchased from farms. Inventories for cattle, hogs, sheep and goats, and poultry were at record levels on January 1, 1984. Average slaughter weights of cattle and hogs in 1983 improved considerably, gaining reportedly by 3 and 4 percent, respectively, from 1982. Total meat production (carcass weight) reached a record 16 million tons, up 4 percent from 1982 and 3 percent from the previous record set in 1978. Milk production rose to a record 96.4 million tons, up 6 percent from 1982. The recovery in milk output was attributable to strong gains in milk yields, especially in the socialized farm sector. Egg production continued on the uptrend and totaled a record 74.7 billion eggs, up 3 percent from the previous high a year earlier.

USSR Total Livestock Inventories, January, 1980-1984

| | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| | | | Million Head | | |
| Total Cattle | 115.1 | 115.1 | 115.9 | 117.2 | 119.4 |
| Including Cows | 43.3 | 43.4 | 43.7 | 43.8 | 43.8 |
| Hogs | 73.9 | 73.4 | 73.3 | 76.7 | 78.5 |
| Sheep and Goats | 149.4 | 147.5 | 148.5 | 148.5 | 151.4 |
| Poultry | 980.9 | 1,029.3 | 1,067.5 | 1,104.5 | 1,125.0 1/ |

1/ Estimate.

USSR Production of Livestock Products, 1980-1983

| | 1980 | 1981 | 1982 | 1983 1/ |
|---|---|---|---|---|
| | | | Million Tons | |
| Total Meat 2/ | 15.1 | 15.2 | 15.4 | 16.0 |
| Milk | 90.9 | 88.9 | 91.0 | 96.4 |
| Eggs (In Billion) | 68.9 | 70.8 | 72.4 | 74.7 |

1/ Preliminary.
2/ Carcass weight.

## 1983 Soviet Plan Fulfillment Report Omits Grain Data

The 1983 plan fulfillment report, released on January 29, was devoid of figures about last year's grain crop, noting only that grain production is higher than last year and that grain resources are sufficient to meet all bakery needs. The last year for which the Soviets released grain production data is 1980. In comments about 1984, the report stated that last fall, winter crops had been seeded on 40 million hectares and 111 million hectares had been plowed. Also, farms have sufficient seed, most of it in proper condition for the spring planting season. (The planned winter crop area was 41 million hectares, and the plan for fall plowing was 112-113 million.)

The 1984 grain production target is 240 million tons, according to the current issue of the Soviet Journal of Agricultural Economics; the area "will not be less than 123 million hectares," and average yields "will not be less than 1.95 tons per hectare." Increases in the areas under corn and pulses are planned.

USSR Weather Highlights

Moisture supplies increased gradually over most winter grain areas. Snowcover extended south, but 50 percent of the major winter wheat area (southern Ukraine, most of the North Caucasus, and lower Volga Valley) still lacks protective cover. Widely fluctuating temperatures across the west and south produced freeze-thaw conditions with possible ice crusting. In early February, the coldest weather to date covered southeastern crop areas. Nighttime lows dropped to around -20°C on February 5. Overall, the impact of the cold was minimal because temperatures moderated the following day and, therefore, were not of sufficient duration to produce significant winterkill.

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Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1983/84

| Year | Production | Trade (July/June) Imports | Trade (July/June) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | (Million Metric Tons) | | | | | | | |
| | | | | **Total Grains 4/** | | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Projected 1983/84 | 200 | 31.0 | 0.5 | 230 | 223 | 27 | 4 | 47 | 21 | 124 | +7 |
| | | | | **Wheat** | | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Projected 1983/84 | 80 | 20.0 | 0.5 | 99 | 94 | 15 | 1 | 36 | 9 | 33 | +5 |
| | | | | **Coarse Grains** | | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Projected 1983/84 | 108 | 10.0 | -- | 118 | 116 | 11 | 3 | 7 | 11 | 84 | +2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.

February 13, 1984

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | -- | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
| Jul-Sep | --- | 2,235 | --- | 45 | 1,773 | 4,053 | 5,100 |
| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 104 | 398 | 1,151 | |
| August | --- | 935 | --- | 150 | 187 | 1,272 | |
| September | --- | 836 | --- | 780 | 225 | 1,841 | |
| July-Sept | --- | 2,420 | --- | 1,034 | 810 | 4,264 | 5,500 |
| October | 1,181 | 677 | --- | 160 3/ | 268 | 2,286 | |
| November | 1,322 | 430 | --- | 430 3/ | 154 | 2,336 | |
| December | 1,283 | 250 | 115 | 626 3/ | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,357 | 115 | 1,216 3/ | 792 | 7,266 | 8,000 |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

February 10, 1984

USSR Grain Area, Yield, and Production
1974-1980,
1981-1982 (Preliminary) and
1983 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
|---|---|---|---|
| Wheat | | | |
| 1974 | 59.7 | 1.41 | 83.9 |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Forecast) | 50.4 | 1.59 | 80.0 |
| Coarse Grains 2/ | | | |
| 1974 | 59.4 | 1.68 | 99.7 |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Forecast) | 62.4 | 1.73 | 108.0 |
| Total Grain 3/ | | | |
| 1974 | 127.2 | 1.54 | 195.7 |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Forecast) | 121.5 | 1.65 | 200.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

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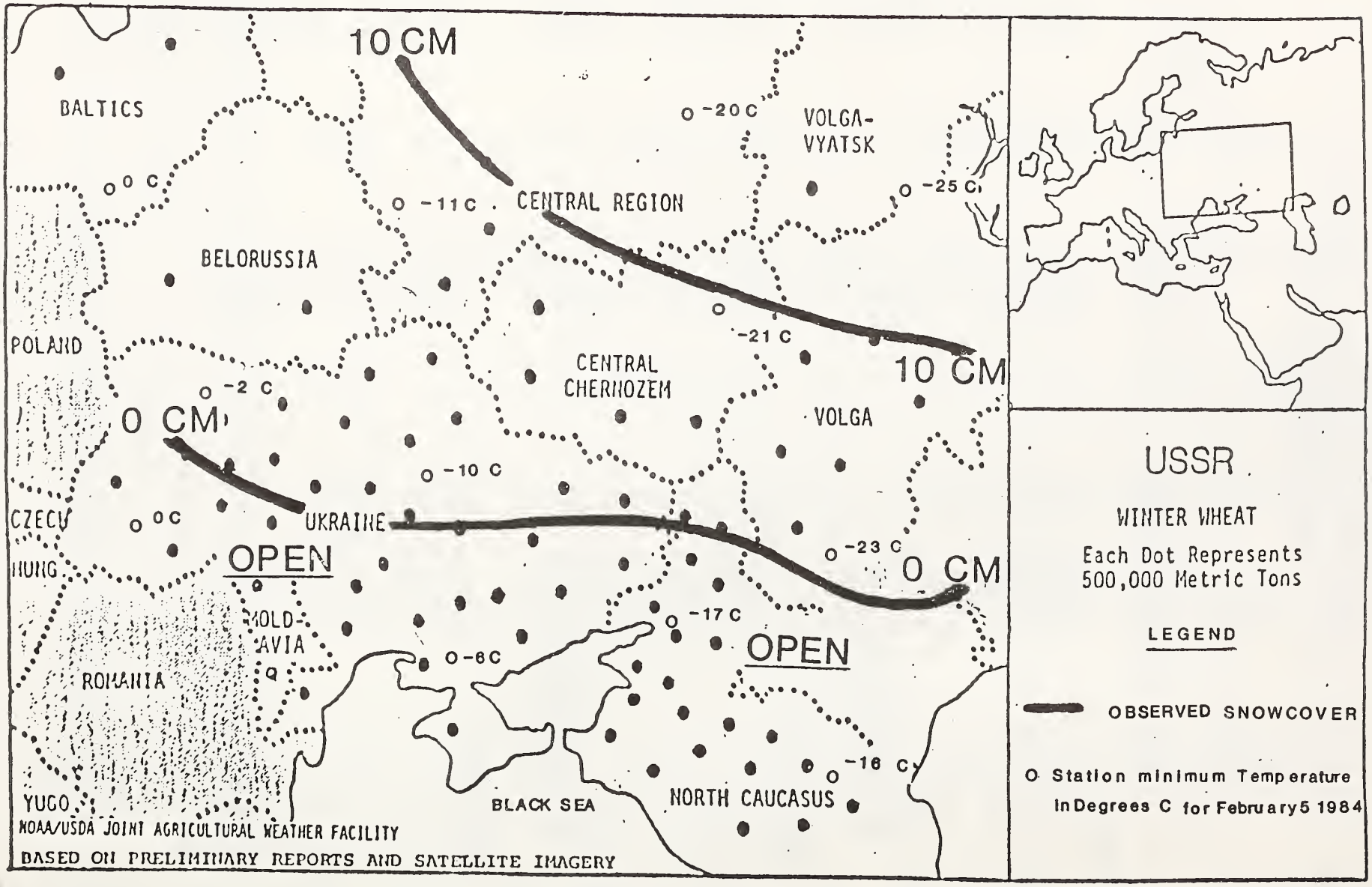




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March 12, 1984

## The USSR Grain Situation

The 1983 Soviet grain production estimate was lowered by 5 million tons to 195 million, still the best Soviet crop outturn since 1978. Total Soviet grain imports for July 1983-June 1984 remain forecast at 31 million tons. The Soviet grain situation over the month was characterized by a lack of reported purchasing activity and an apparent overall slowdown in shipments. However, both shipments and sales are expected to pick up in coming months. To date, prospects for the Soviet winter grain crop appear somewhat better than last year.

### The 1983 Grain Production Estimate Is Revised Downward

A reassessment of weather and yield data has led to a 5-million-ton reduction in the 1983 Soviet grain crop estimate. The revised production estimate of 195 million tons also takes into consideration the recent statement of Soviet General Secretary Chernenko that the 1983 crop "exceeded 190 million tons." This marks the first and most specific official comment regarding a crop outturn in the last 3 years. The 1980 Soviet grain crop was the last one for which official production data were released.

The revised production estimate, combined with currently forecast imports of 31 million tons, would mean only modest Soviet stock-building activity in 1983-84. Grain utilization is estimated to increase largely because of higher grain-for-feed-use required to support record livestock inventories and production.

### Soviet Grain Buying Quiet

The Soviets are forecast to import 20 million tons of wheat, 10 million tons of coarse grains and 1 million tons of miscellaneous grains in July-June 1983/84, unchanged from a month ago. To date the Soviets have purchased nearly 19 million tons of wheat and over 6 million tons of coarse grain from all origins, or about 80 percent of forecast import requirements. Soviet reported purchases from the United States already total 4.2 million tons of wheat and 4.0 million of corn, with additional purchases anticipated.

**********
* *This circular series has been renumbered. This is the third USSR Grain *
* Situation and Outlook report published by FAS in 1984. The first was *
* numbered FG-3-84, and the second, SG-4-84. All subsequent issues will *
* be in the "SG" series and will be numbered in sequential order. *
**********

## Canadian Grain Shipments Continue Well Behind Last Year

The United States replaced Canada as the Soviet's major grain supplier in the October-December 1983 period, with Canadian shipments falling to less than half of the 1982-83 pace for the same period. Preliminary January export data indicate that the shipping pace from all major exporting countries to the USSR fell from the heavy November-December movement. Canadian January grain shipments fell to the lowest level in several years. Canadian grain exports as a whole in the July-January period lag last year's movement by more than 1.5 million tons. The United States represented about 28 percent of total Soviet imports in the July-December period, compared to only 16 percent for the same period last year.

## Soviet Livestock Sector Continues Gains

Continued gains in livestock performance on state and collective farms were recorded in January. This resulted from both improved feed supplies and the mild 1983/84 winter. February 1, 1984 cattle, hog, and poultry numbers were records, rising by 2, 4, and 2 percent, respectively, compared to a year earlier. Cow numbers remained the same, while sheep and goat numbers rose to a near record. Total meat output (live weight) in January 1984 rose more than 7 percent from a year earlier. The largest production gains were in pork--up 19 percent, and in poultry meat--up 8 percent. Beef production gained 3 percent, while mutton and lamb production dropped slightly. After making good gains in 1983 following several years of decline, milk production continued to show further improvement at the start of 1984 with a 6-percent increase this January over last. All the increase was accounted for by higher average milk yields. Egg production continued the uptrend of recent years. January output rose 5 percent from a year earlier and average yields per hen rose 6 percent.

USSR Livestock Inventories on State and Collective Farms
February 1, 1980-84

| | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| | Million Head | | | | |
| Total Cattle 1/ | 88.9 | 89.4 | 90.1 | 90.6 | 92.7 |
| Cows | 29.5 | 29.6 | 29.7 | 29.7 | 29.7 |
| Hogs | 54.9 | 55.4 | 54.8 | 56.6 | 58.6 |
| Sheep and Goats | 119.8 | 117.7 | 117.8 | 117.3 | 119.8 |
| Poultry | 586.0 | 624.1 | 651.0 | 687.0 | 703.0 |

1/ Including cows.

USSR Output of Livestock Products on State and Collective Farms
January 1980-84

| | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| | | | 1000 Tons | | |
| Total Meat 1/ | 1,426 | 1,494 | 1,392 | 1,442 | 1,550 |
| Beef | 932 | 977 | 898 | 918 | 950 |
| Pork | 346 | 356 | 323 | 338 | 402 |
| Mutton & Lamb | 29 | 29 | 30 | 28 | 28 |
| Poultry | 119 | 132 | 141 | 158 | 171 |
| Milk | 3,830 | 3,752 | 3,589 | 3,984 | 4,233 |
| Eggs (In Millions) | 3,614 | 3,900 | 3,979 | 4,269 | 4,478 |

1/ Liveweight.

## 1984 Soviet Winter Grain Crop

Prospects for the 1984 winter grain crop are generally better than a year ago, but potential problems exist. Last fall, planting was done on time and with generally better soil moisture than the year before. However, moisture was limited in some of the southern and eastern winter wheat regions, preventing the plants from developing properly. Temperatures in the fall were above average until mid-November when they dropped sharply, forcing grains into dormancy in poorly hardened condition. Despite several sharp cold snaps, the winter has been generally mild with much of the southern winter grain area devoid of snow cover. While the crop has been vulnerable to winterkill, losses so far may be about average. Concern continues over yield potential because of less than optimal soil moisture in parts of the Central Black Soil Zone, eastern Ukraine, Volga Valley and North Caucasus.

Although no official data on 1984 winter grain seedings have been released, it has been reported that 40 million hectares of all winter crops were planted last fall. This compares with 37.5 million the previous year, for which a preliminary harvested winter grain area of 28.6 million hectares--the smallest since 1979--has been reported. Therefore, it is assumed that the 1984 winter grains area will be about 31-32 million hectares. Reports of dryness in parts of the North Caucasus and the Ukraine include statements that reseeding of winter grain areas will be necessary. Like last year, replanting with corn is being recommended.

Increased plantings of corn and pulses are called for in the 1984 grain plan. The official production target is 240 tons, as reported in a recent issue of the Soviet Journal of Agricultural Economics; the area "will not be less than 123 million hectares;" and average yields "will not be less than 1.9 tons per hectare."*

*In SG-4-84, dated February 13, 1984, the minimal yield target published by the Soviets was mistakenly reported as 1.95 tons per hectare.

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1974-1980,
1981-1982 (Preliminary) and
1983 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
|---|---|---|---|
| Wheat | | | |
| 1974 | 59.7 | 1.41 | 83.9 |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Forecast) | 50.4 | 1.55 | 78.0 |
| Coarse Grains 2/ | | | |
| 1974 | 59.4 | 1.68 | 99.7 |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Forecast) | 62.4 | 1.68 | 105.0 |
| Total Grain 3/ | | | |
| 1974 | 127.2 | 1.54 | 195.7 |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Forecast) | 121.5 | 1.60 | 195.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

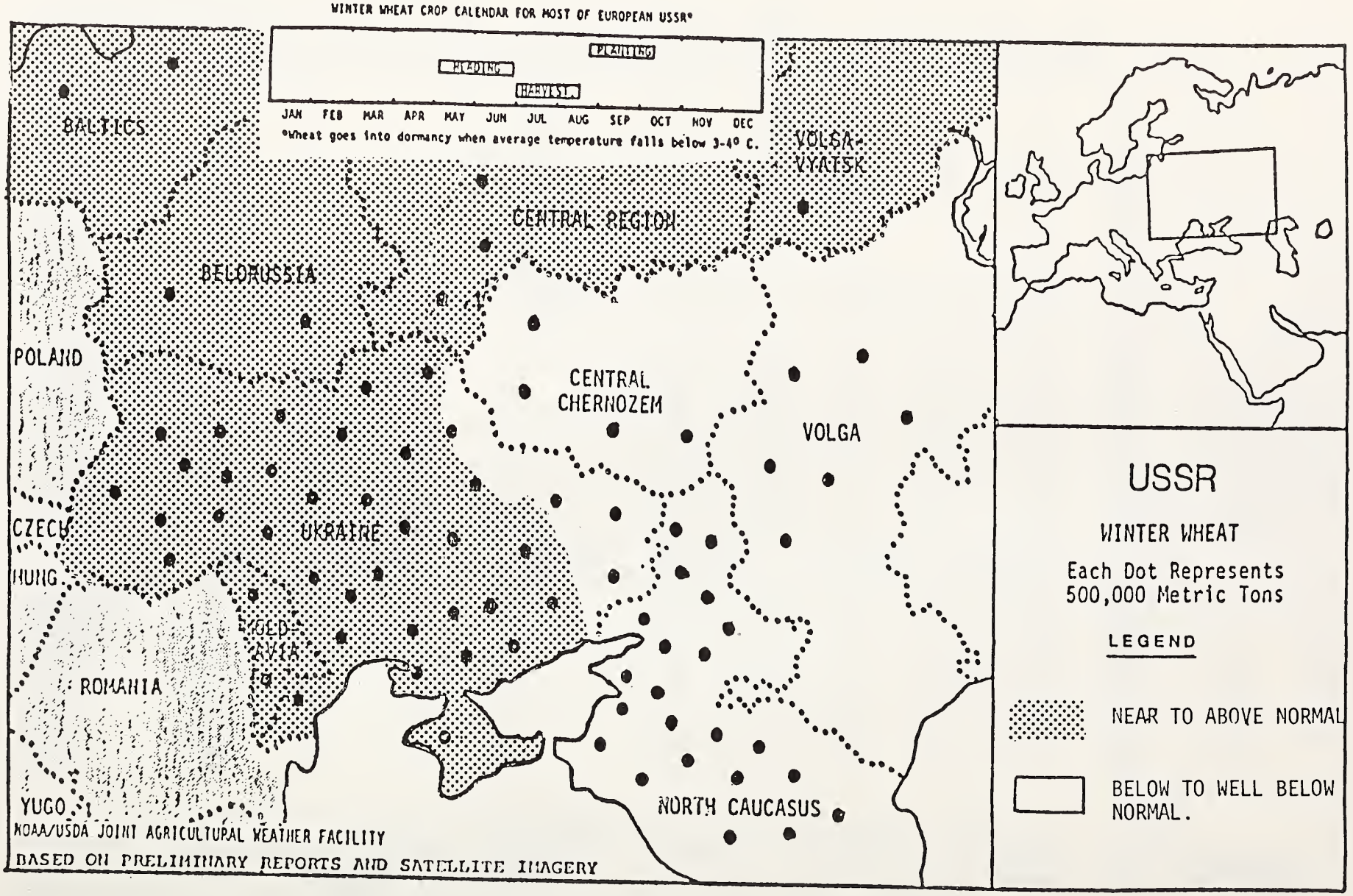
USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1983/84

| Year | Production | Trade (July/June) Imports | Trade (July/June) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | (Million Metric Tons) | | | | | | | |
| | | | | Total Grains 4/ | | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Projected 1983/84 | 195 | 31.0 | 0.5 | 225 | 222 | 27 | 4 | 47 | 21 | 123 | +3 |
| | | | | Wheat | | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Projected 1983/84 | 78 | 20.0 | 0.5 | 97 | 94 | 15 | 1 | 36 | 9 | 33 | +3 |
| | | | | Coarse Grains | | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Projected 1983/84 | 105 | 10.0 | -- | 115 | 115 | 11 | 3 | 7 | 11 | 83 | 0 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.

March 12, 1984 0822G Page 1

# WINTER MOISTURE ACCUMULATIONS
# (DEC. 1983-FEB. 1984)



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SG-6-84*
April 10, 1984

## The USSR Grain Situation

A flurry of grain-buying activity this past month pushed total Soviet grain purchases for the 1983/84 marketing year to more than 29 million tons. Coarse grains accounted for virtually all of the new buying. Based on reports from the major suppliers, the pace of Soviet grain shipments also improved. Conditions over the winter grain area improved somewhat over the past month although some areas remained quite dry and good spring rains are sorely needed.

### 1984 Soviet Winter Grain Crop Faces Potential Problems

Overall, prospects for the 1984 winter grain crop remain generally better than a year ago, but potentially serious problems exist in the eastern part of the winter wheat region. Although significant rains, the first since early February, fell recently in parts of the eastern Ukraine, North Caucasus and lower Volga Valley, these areas will need optimal precipitation for the remainder of the growing season if the crop is to develop normally. The recent rains were timely since they coincided with the crop breaking dormancy, and will benefit spring crop seeding. The southern part of the Central Black Soil Zone also has concern about its yield potential because of less-than-optimal soil moisture. A cold snap hit the western Ukraine around March 21, but adequate snowcover prevented widespread winterkill, even though minimum temperatures dropped to the threshold for causing losses. Overall, winterkill to the 1984 grain crop should be no more than average. A seasonal warming trend came to the winter grain area at the end of March and is continuing. As a result, the grains are breaking dormancy across the south at normal dates, while snowcover in the north is receding a bit earlier than usual.

```
*************************************************************************
*  This circular series has been renumbered.  This is the fourth USSR Grain *
*  Situation and Outlook report published by FAS in 1984.  The first was    *
*  numbered FG-3-84, the second SG-4-84, and the third, SG-5-84.  All sub-  *
*  sequent issues will be in the "SG" series and will be numbered in        *
*  sequential order.                                                        *
*************************************************************************
```

The area for harvest for the 1984 winter grain crop will likely be 31-32 million hectares, this comes from a total winter crop of 40 million hectares. The figure may be reduced, however, depending on the area to be reseeded, because of winterkill or excessive dryness. In 1983, the preliminary winter grain harvested area was officially given as 28.6 million hectares--the smallest since 1979. Generally better conditions for fall sowing suggest the increase in winter grain area for 1984 will be almost entirely wheat.

## Soviets Return to Coarse Grain Market

The estimate of Soviet grain imports is unchanged from a month ago at 31 million tons, including 20 million tons of wheat, 10 million of coarse grains and 1 million of miscellaneous grains and rice.

Estimated Soviet grain purchases from all origins have topped 29 million tons. Wheat purchases continue to hold at around 19 million tons as the Soviets were relatively inactive in the wheat market in March. Over the past month, the Soviets contracted for nearly 2 million tons of U.S. corn, most for nearby delivery. Reportedly, the Soviets also purchased around 2 million tons of Argentine corn and sorghum. It appears that the Soviets have about covered their projected coarse grain import requirements of 10 million tons for the July-June marketing year.

The timing of the recent Soviet coarse grain purchases and the projected shipping schedule has raised expectations about the amount of coarse grains that the Soviets may import during the October-September 1983/84 period. The estimate of Soviet coarse grain imports for this period has been increased 500,000 tons to 11.5 million. The recent surge in Soviet coarse grain purchases may reflect expectations that corn prices could go higher later in the marketing year and the need to supplement domestic corn supplies for the state mixed feed industry as procurements fell short of last year's level despite an improved crop.

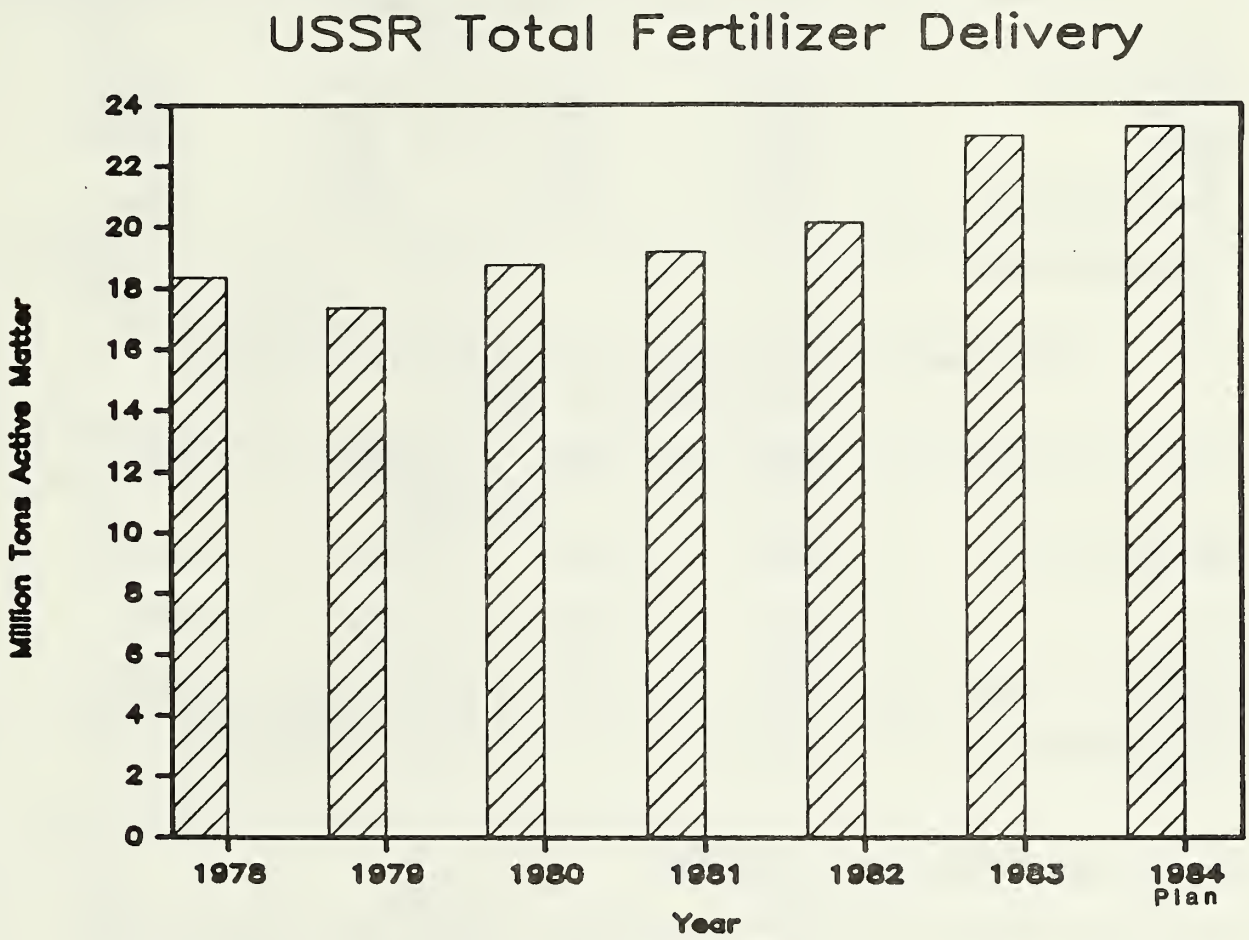
## U.S. Sales To USSR Exceed LTA Minimun

The recent surge in Soviet purchases of U.S. grain pushed the total for the first year of the new Long Term Agreement (LTA) to more than 10 million tons, including 4.2 million of wheat and 6 million of corn. The Soviets have also purchased over 400,000 tons of soybeans. The current agreement calls for minimum annual shipments of 9 million tons, of which at least 4 million must be wheat, and 4 million, corn. The Soviets have the option of satisfying the remaining 1 million tons by purchasing wheat, corn, soybeans, and/or soybean meal, with every ton of soybeans and meal purchased counting as 2 tons of grain. The Soviets may purchase up to a total of 12 million tons of wheat and/or corn with out prior consultations.

At consultations held in January, the United States indicated an additional 10 million tons of U.S. wheat and corn would be available for sale by U.S. exporters to the Soviet Union for shipment during the current agreement year (October 1, 1983-September 30, 1984) without further consultations.

## Fertilizer Availability Could Increase

Fertilizer deliveries in the USSR in 1984 are expected to increase only slightly over 1983. The 1984 plan calls for deliveries of 23.3 million tons of active matter compared with actual deliveries in 1983 of 23 million tons. Actual deliveries could well exceed the plan level given the likely 5-percent increase in fertilizer production. Despite the modest planned increase over 1983, fertilizer deliveries would be 24 percent above the 1978-82 average of 18.8 million tons. As in recent years, grain and feed crops will be given high priority in fertilizer utilization.




Compiled by EE-USSR Branch, IED/ERS from official Soviet data.

## Soviet Livestock Sector Continues to Show Improvement

The Soviet Union appears to have record feed availabilities in July-June 1983/84. Estimates of total feed supplies, measured in the Soviet oat unit equivalent, indicate roughly a 4-percent increase over 1982/83 and a 10-percent increase over the 1979/80-1981/82 average. Supplies of coarse and succulent feeds have increased most rapidly, as a result of greater supplies of fertilizer and machinery for feed crop lands, better labor management, and favorable weather for feed crop production.

As of March 1, livestock inventories on state and collective farms remained generally at or above previous record levels. Thus far in 1984, production of meat, milk, and eggs has continued at a record pace following record production of all three in 1983.

USSR Livestock Inventories On State And Collective Farms
March 1, 1981-84

| | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|
| | Million Head | | | |
| Total Cattle 1/ | 90.0 | 90.6 | 91.6 | 94.0 |
| Cows | 29.6 | 29.7 | 29.6 | 29.6 |
| Hogs | 55.2 | 54.6 | 56.8 | 58.9 |
| Poultry | 651.3 | 669.8 | 704.0 | 721.0 |
| Sheep and Goats | 124.4 | 124.0 | 123.0 | 125.6 |

1/ Including cows.

USSR Livestock Production On State And Collective Farms
January-February, 1981-84

| | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|
| | 1,000 Tons | | | |
| Total Meat 1/ | 2,692 | 2,552 | 2,655 | 2,870 |
| Milk | 7,547 | 7,200 | 7,985 | 8,626 |
| Eggs (In Millions) | 7,604 | 7,697 | 8,290 | 8,678 |

1/ Liveweight.

## 1983 Area and Crop Estimates Unchanged

With no new official information on last year's grain crop, the production estimate for 1983 remains unchanged from last month at 195 million tons, including 78 million wheat, 105 million coarse grains and 12 million miscellaneous grains and pulses. The estimated area of the 1983 harvest remains unchanged at 121.5 million hectares, the smallest since 1972. It includes only 50.4 million hectares of wheat, the smallest area for that crop since at least the mid-1950s—before the New Lands were brought into production--and 62.4 million of coarse grains--which would be a record--and 8.7 million of miscellaneous grains and pulses.

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR Grain Area, Yield, and Production
1974-1980,
1981-1982 (Preliminary) and
1983 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
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| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Forecast) | 50.4 | 1.55 | 78.0 |
| Coarse Grains 2/ | | | |
| 1974 | 59.4 | 1.68 | 99.7 |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Forecast) | 62.4 | 1.68 | 105.0 |
| Total Grain 3/ | | | |
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| 1975 | 127.9 | 1.10 | 140.1 |
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| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Forecast) | 121.5 | 1.60 | 195.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1983/84

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|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | (Million Metric Tons) | | | | | | | |
| | | | | Total Grains 4/ | | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Projected 1983/84 | 195 | 31.0 | 0.5 | 225 | 222 | 27 | 4 | 47 | 21 | 123 | +3 |
| | | | | Wheat | | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Projected 1983/84 | 78 | 20.0 | 0.5 | 97 | 94 | 15 | 1 | 36 | 9 | 33 | +3 |
| | | | | Coarse Grains | | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Projected 1983/84 | 105 | 10.0 | -- | 115 | 115 | 11 | 3 | 7 | 11 | 83 | 0 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.

March 12, 1984

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | -- | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
| Jul-Sep | --- | 2,235 | --- | 45 | 1,773 | 4,053 | 5,100 |
| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 104 | 398 | 1,151 | |
| August | --- | 935 | --- | 150 | 187 | 1,272 | |
| September | --- | 836 | --- | 780 | 225 | 1,841 | |
| July-Sept | --- | 2,420 | --- | 1,034 | 810 | 4,264 | 5,500 |
| October | 1,181 | 677 | --- | 160 3/ | 268 | 2,286 | |
| November | 1,322 | 430 | --- | 430 3/ | 154 | 2,336 | |
| December | 1,283 | 250 | 115 | 626 3/ | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,357 | 115 | 1,216 3/ | 792 | 7,266 | 8,000 |
| January 1984 | 863 | 26 | 256 | 330 3/ | 838 | 2,313 | |
| February | 944 | 36 | 312 | 315 3/ | 1,030 | 2,637 | |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

March 9, 1984

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Approved by the World Agricultural Outlook Board • USDA

SG-7-84
May 10, 1984

## The USSR Grain Situation and Outlook

The highlights of the 1984/85 Soviet grain outlook are:

- Projections for a crop of 190 million tons, down slightly from last year's estimate, but still the second largest harvest since the record 1978 crop.

- Early indications that the coarse grain crop could be down significantly from last year's large outturn. Coarse grain area is expected to fall from the high 1983/84 level; yield prospects also are not as bright.

- Another year of large Soviet imports with 1984/85 trade expected to exceed 30 million tons for the sixth year in a row, possibly reaching 35 million. Wheat imports are projected to continue at recent levels of around 20 million tons.

- Domestic use of grain is expected to continue heavy as feed use increases slightly, reflecting continued expansion in the Soviet livestock sector.

### Early Prospects for 1984 Crop Not Favorable

The initial USDA estimate of the 1984 Soviet grain crop is 190 million tons, about the same as the 1983 harvest and well below this year's target of 240 million tons.

Soil moisture conditions in most major winter grain areas in western USSR--where about two-thirds of the Soviet crop is produced--are no more favorable than a year ago. During the past winter, moisture accumulations were below normal in half of the areas where winter wheat is grown. In the winter of 1982/83, only about one-third of the wheat areas had below-normal

moisture accumulations. Thus, some areas failed to achieve groundwater recharge. Some of the driest areas, primarily the eastern Ukraine, North Caucasus, lower Volga Valley and southern Central Black Soil Zone which account for nearly 50 percent of winter wheat output, received rains in late April and early May, but the subsoil remained dry. These rains coincided with a slight drop in temperature which added to their benefit. To the north, snowcover disappeared and winter crops broke dormancy earlier than usual. Spring fieldwork is well underway, implying soil moisture is less than optimal for this time of year. The combination of timely rains and normal temperatures for the rest of the growing season is necessary for winter grains to develop properly over most of the western USSR. Prospects for spring grains in this area are also affected by lack of subsoil moisture, reportedly, this had impeded the plan to increase corn plantings. In general, yield prospects in the western USSR are no better than a year ago. However, east of the Urals where spring wheat and spring barley are important crops, soil moisture supplies are above-normal, nearly the same as a year ago. Planting begins there about May 10. Seed quality problems, an outgrowth of last year's harvest, have been reported in some of these eastern areas. Soviet fertilizer production in the first quarter of 1984 increased 4 percent over the same period a year ago. Importantly, however, only a slight increase in overall fertilizer usage is planned.

The 1984 crop area is estimated at 121 million hectares. This is about 2 million below the planned "not less than 123 million," but consonant with performance in 1983 when an estimated 121.5 million hectares were harvested from the planned 124 million. (The Soviets have not issued official final area data for the 1983 crop.) Also, no change has been noted in the policy to expand the area under fallow.

The 190-million-ton estimate of the 1984 crop inclues 85 million of wheat, 95 million of coarse grains and 10 million of miscellaneous grains and pulses. The area estimates are 53 million hectares of wheat, 59 million of coarse grains, and 9 million of miscellaneous grains and pulses. Winter grain output is estimated at 59.7 million tons, and spring grain production at 130.3 million. This level of winter grain production represents an increase over the 55.6 million tons estimated for the 1983 crop and results from about 3 million hectares more being seeded last fall. While the area of winter grains, primarily wheat, is estimated to be larger for the 1984 crop, average yields are expected to be about the same because the plants did not have the opportunity to harden properly in the fall and were forced into dormancy by a sharp drop in temperatures in mid-November. Relative to the estimated output of wheat, coarse grain production is expected to decline this year as a consequence of poor soil moisture reserves in the western part of the country. (The bread grain crop--wheat and rye--for 1984 is estimated at nearly 100 million tons compared with 92.6 million in 1983.)

Seeding progress this spring has been slower than last year's accelerated pace but somewhat faster than normal. As of April 23, the last date for which complete reports have been received, 19.6 million hectares of small grains and pulses had been planted. This compares with a long-term average of 16.8 million hectares. It was reported that as of April 30, corn planting had been completed on only 1.3 million hectares, well down from the 3.9 million seeded by the same date last year and far from the 5.7-million-hectare target for 1984. Because of this lag and the relatively short corn growing season in the USSR, corn area is estimated only at 4.5 million hectares. The official preliminary figure for 1983 was 5.2 million hectares.

## Soviet Grain Imports Expected to Increase

Soviet grain imports for July-June 1984/85 are projected at 35 million tons, the second highest level on record and the sixth consecutive year of imports of at least 30 million tons. With world wheat supplies in 1984/85 at record or near-record levels, and wheat prices depressed, the Soviets again are expected to import large quantities of wheat, possibly even importing wheat specifically for feed. Wheat imports are forecast to remain at 20 million tons, marking the fourth year of high Soviet wheat imports. Prospects for improved world coarse grain supplies, lower prices and the possibly lower domestic production in 1984 are expected to result in larger Soviet imports. Coarse grain imports, estimated at 14 million tons for 1984/85, are expected to be up significantly from the level of the past 2 years but still well below the levels reached during 1979/80-1981/82. Estimated Soviet imports of rice and miscellaneous grains and pulses remain at 1 million tons.

The Soviets have grain-trading agreements with a number of countries which commit them to take around 20 million tons of grain from the world market. These agreements also have acted as a mechanism for expanded grain trade and are likely to do so again in 1984/85, since around 90 percent of Soviet grain imports come from countries with which they have agreements.

If the 1984 grain harvest should exceed the current estimate of 190 million tons, it is likely that there only would be modest decline in imports from the estimate of 35 million tons as the Soviets then might push domestic consumption higher and/or rebuild stocks. If crop prospects should decline, it is likely that grain imports could increase significantly, as the Soviets act to maintain livestock inventories.

## Coarse Grain Imports to Rise--Wheat Unchanged

Over the past 5 years, Soviet wheat crops have averaged 86 million tons and wheat imports have averaged 18 million. This import level is equivalent to roughly half of the estimated Soviet domestic food use. Large imports have occurred not only due to production fluctuations, but also have been influenced recently by the quality of the outturn. This was particularly evident in 1980 when wet weather at harvest caused a deterioration in the quality of the crop, offsetting the effects of a large outturn and resulting in large imports. If world wheat supplies continue to be projected at a larger level; prices are expected to be depressed and the Soviets will be operating in a buyers market.

Soviet coarse grain imports over the past 2 seasons have been well below imports of previous years, reflecting 1983's good crop, 2 consecutive years with large forage crops, 2 consecutive mild winters, and the Soviet decision in 1982/83 to minimize coarse grain purchases in a world coarse grain market dominated by the United States. Soviet grain trading agreements with the various suppliers assure access to around 10 million tons of coarse grains. Purchases above that level will likely depend on relative grain prices in the world market and the final outturn of the Soviet's own corn and other coarse grain crops. With the 1984 coarse grain harvest expected to fall below last year, it is likely that imports will rise to around 14 million tons as the Soviets attempt to maintain supplies at least near last year's level.

## Projected Domestic Use to Increase

Soviet grain use is expected to show little growth in 1984/85. Plans for another increase in meat production, and the likelihood that domestic non-grain feed supplies likely will be no better than 1983/84's crop, point to some expansion in grain for feed use this year, but not at a rate sufficient to maintain recent meat production growth rates. Grain used for seed, industry and food is expected to continue close to 80 million tons. The allowance for dockage and waste in the 1984 crop--a measure of excess moisture and other non-grain matter—is estimated at 20 million tons based on a pre-season estimate of about 11 percent of total production.

## Review of 1983/84 Situation

Soviet purchases from all origins for delivery in 1983/84 appear to be near 30 million tons. The coarse grain import estimate of 10 million tons appears to be fairly well covered based on recent purchasing activity. For the April-June period, the Soviets appear to have around 5 million tons scheduled for shipment from the United States and Argentina; however, port congestion and shipping delays could limit movement from Argentina. If the pace of grain shipments is above current expectations, Soviet coarse grain imports during the July-June 1983/84 period could exceed 10 million tons. The pace of Soviet wheat shipments for the April-June quarter is expected to slump, averaging only slightly over a million tons a month. However, if Soviet crop prospects deteriorate, this pace could quicken. Canada is expected to be the principal wheat shipper to the Soviet Union during this period.

## Soviet Livestock Sector Continues to Improve

First-quarter 1984 Soviet livestock inventories and production on state and collective farms continued at a record pace. The marked improvement resulted from record feed availabilities, a mild winter and, very probably, the 1983 increase in government prices for livestock and products purchased from farms.

USSR Livestock Inventories On State And Collective Farms
April 1, 1978-84

| Year | Total Cattle | Cows | Hogs | Poultry | Sheep & Goats |
|---|---|---|---|---|---|
| | --million head-- | | | | |
| 1978 | 89.9 | 29.0 | 53.7 | 575.2 | 137.2 |
| 1979 | 91.1 | 29.4 | 54.9 | 617.5 | 139.7 |
| 1980 | 91.6 | 29.6 | 54.4 | 642.8 | 137.8 |
| 1981 | 92.2 | 29.7 | 55.2 | 689.7 | 135.9 |
| 1982 | 92.6 | 29.8 | 54.1 | 706.9 | 135.1 |
| 1983 | 93.8 | 29.7 | 56.8 | 733.3 | 133.9 |
| 1984 | 96.0 | 29.7 | 58.6 | 746.0 | 136.7 |

First-quarter output of most livestock products on state and collective farms continued to make strong gains and exceeded last year's first-quarter record levels. Total meat production (liveweight) rose 7 percent, with the largest gains reported for pork (up 15 percent), poultry meat (up 7 percent), and beef (up 5 percent). Mutton and lamb output rose 2 percent.

USSR Livestock Production On State and Collective Farms
January-March, 1978-84

| Product | 1978 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|---|---|
| Total Meat 1/ (1,000 Tons) | 3,881 | 3,878 | 4,025 | 3,994 | 3,940 | 4,146 | 4,450 |
| Milk (Million Tons) | 14.0 | 13.5 | 12.8 | 12.5 | 12.0 | 13.2 | 14.2 |
| Eggs (In Billions) | 10.1 | 10.4 | 10.9 | 11.7 | 11.9 | 12.7 | 13.2 |

1/ Liveweight

First-quarter 1984 sales of livestock products from state and collective farms to the government also reached records. Sales of meat (liveweight) rose 7 percent, milk, 10 percent, and eggs, 4 percent, all from a year earlier.

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1984/85

| Year | Production | Trade (Jul/Jun) Imports | Trade (Jul/Jun) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | (Million Metric Tons) | | | | | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Projected 1983/84 | 195 | 31.0 | 0.5 | 225 | 222 | 27 | 4 | 47 | 21 | 123 | +3 |
| Projected 1984/85 | 190 | 35.0 | 1.0 | 224 | 224 | 27 | 4 | 48 | 20 | 125 | 0 |
| Projected Variability 7/ | (±20) | (±5) | (±.5) | | (±10) | | | | | | (±6) |
| | | | | | Wheat | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Projected 1983/84 | 78 | 20.0 | 0.5 | 97 | 94 | 15 | 1 | 36 | 9 | 33 | +3 |
| Projected 1984/85 | 85 | 20.0 | 1.0 | 104 | 104 | 15 | 1 | 37 | 9 | 42 | 0 |
| Projected Variability 7/ | (±15) | (±5) | (±.5) | | (±7) | | | | | | (±5) |
| | | | | | Coarse Grains | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Projected 1983/84 | 105 | 10.0 | -- | 115 | 115 | 11 | 3 | 7 | 11 | 83 | 0 |
| Projected 1984/85 | 95 | 14.0 | -- | 109 | 109 | 11 | 3 | 7 | 10 | 78 | 0 |
| Projected Variability 7/ | (±17) | (±4) | | | (±8) | | | | | | (±3) |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.
7/ The indicated variation around the projections in this report should encompass final outcomes about two out of three times.

FAS, Grain and Feed Division

USSR Grain Area, Yield, and Production
1975-1980,
1981-1982 (Preliminary), 1983 (Estimate)
and 1984 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
|---|---|---|---|
| Wheat | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Estimate) | 50.4 | 1.55 | 78.0 |
| 1984 (Forecast) | 53.0 | 1.60 (±.25) | 85.0 (±15) |
| Coarse Grains 2/ | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Estimate) | 62.4 | 1.68 | 105.0 |
| 1984 (Forecast) | 59.0 | 1.61 (±.25) | 95.0 (±17) |
| Total Grain 3/ | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Estimate) | 121.5 | 1.65 | 195.0 |
| 1984 (Forecast) | 121.0 | 1.57 (±.15) 4/ | 190.0 (±20) 4/ |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.
4/ The indicated variation around the projections in this report should encompass final outcomes about two out of three times.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | — | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
| Jul-Sep | --- | 2,235 | --- | 45 | 1,773 | 4,053 | 5,100 |
| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 104 | 398 | 1,151 | |
| August | --- | 935 | --- | 150 | 187 | 1,272 | |
| September | --- | 836 | --- | 780 | 225 | 1,841 | |
| July-Sept | --- | 2,420 | --- | 1,034 | 810 | 4,264 | 5,500 |
| October | 1,181 | 677 | --- | 160 3/ | 268 | 2,286 | |
| November | 1,322 | 430 | --- | 430 3/ | 154 | 2,336 | |
| December | 1,283 | 250 | 115 | 626 3/ | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,357 | 115 | 1,216 3/ | 792 | 7,266 | 8,000 |
| January 1984 | 863 | 26 | 256 | 330 3/ | 838 | 2,313 | |
| February | 944 | 36 | 312 | 370 3/ | 1,030 | 2,692 | |
| March | 1,521 | 18 | 250 | 300 3/ | 1,018 | 3,107 | |
| Jan-Mar | 3,328 | 80 | 818 | 1,000 3/ | 2,886 | 8,112 | 8,600 |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

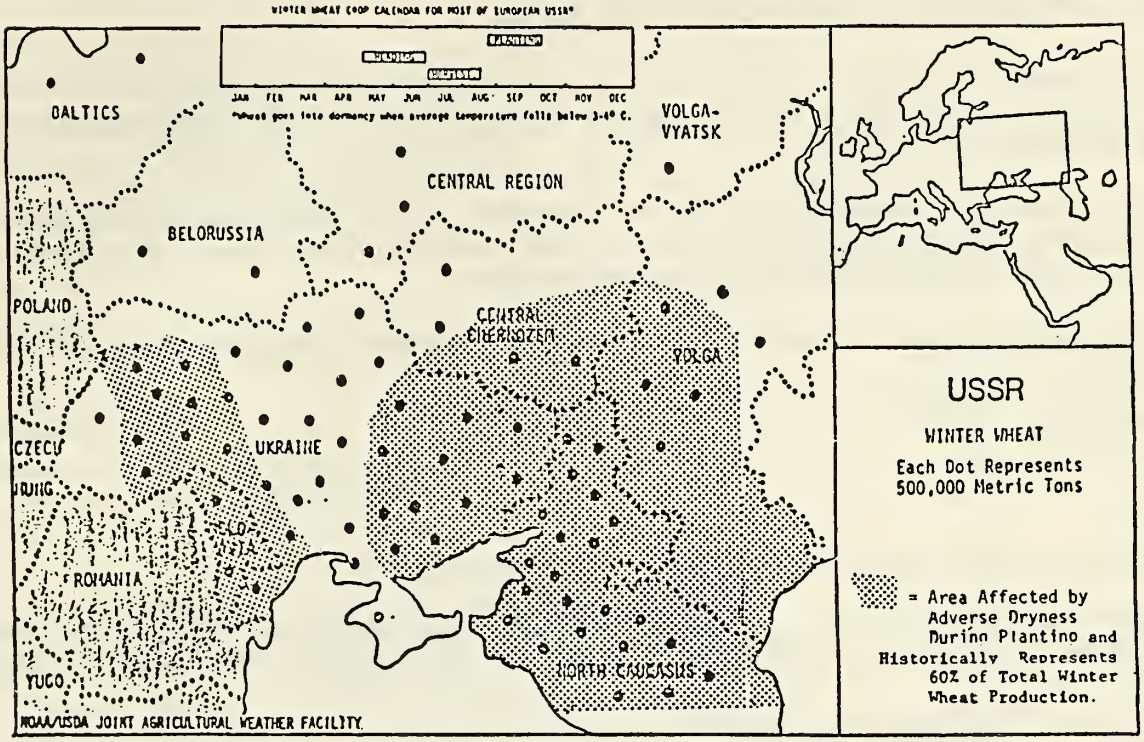
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

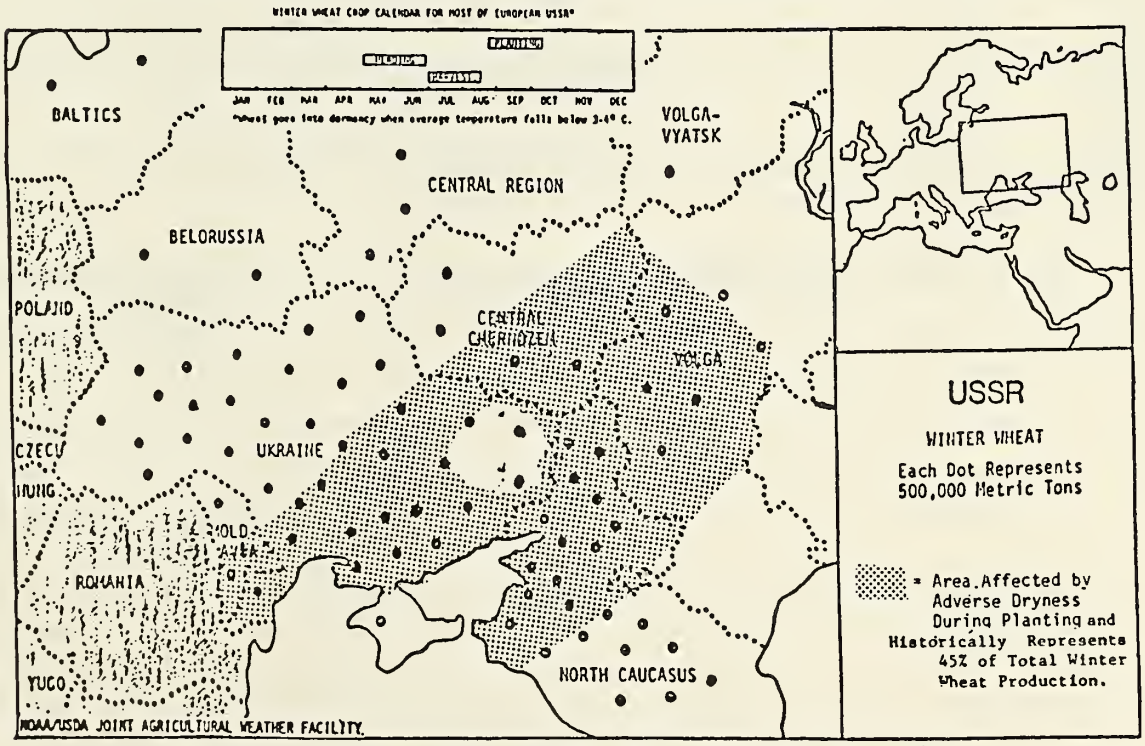
FAS, Grain and Feed Division

## AUTUMN 1982 WINTER WHEAT PLANTING CONDITIONS




* Widely fluctuating temperatures in affected areas produced unfavorable conditions for hardening.
* Weather conditions for winterkill about normal.
* Moisture accumulations during the winter were below normal in 35% of total winter wheat areas.

## AUTUMN 1983 WINTER WHEAT PLANTING CONDITIONS




* Sharp drop in temperatures in mid-November forced crop into dormancy with minimal hardening.
* Weather conditions for winterkill about normal.
* Moisture accumulations during the winter were below normal in 50% of total winter wheat areas.



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Approved by the World Agricultural Outlook Board • USDA

SG-8-84
June 12, 1984

# The USSR Grain Situation and Outlook

Soviet crop prospects are basically unchanged from a month ago with a minor reduction in coarse grain outturn offset by an increase in projected production of miscellaneous grains and pulses. Soviet grain buyers have been active in the world marketplace in recent weeks covering close to 20 percent of their projected 1984/85 import needs of 35 million tons with non-U.S. grain. Grain utilization in 1984/85 is projected to reach an all time high of over 200 million tons.

## 1984 Crop Estimate Holds Coarse Grain Down

The June forecast of the 1984 Soviet grain harvest is 190 million tons. Conditions at the end of the first week in June indicate this figure will include 85 million tons of wheat, 94 million of coarse grains and 11 million of miscellaneous grains and pulses. While the forecast total crop is the same as in May, the composition is different - with coarse grains down 1 million tons, miscellaneous grains and pulses up 1 million and wheat unchanged. The primary events, seen as offsetting in the total, were drought that affected the west and unusually good conditions in much of the New Lands where seeding was accomplished in the second half of May. Winter grain output now is forecast at 58.5 million tons, down slightly from the May figure; the spring grain harvest is 131.5 million tons, up slightly. Estimated 1984 crop area remains at 121 million hectares with wheat, coarse grains, and miscellaneous grains all staying at 53 million, 59 million and 9 million, respectively. Figures for winter and spring grain areas have changed, however, since May. Winter grain area now is estimated at 30.4 million hectares, down by 500,000, while spring grain area was raised to 90.6 million, up by 500,000.

A blocking high pressure system that became established over the Volga Valley in the first week of May affected conditions over much of European USSR. With the exception of some of the southern areas, the system virtually precluded rainfall in much of the eastern part of that region of the country, causing drought conditions. Locally, showers brought some relief in the last days of May and early June. Irreparable damage has been sustained in some areas and continued timely rains and normal temperatures are needed to prevent further deterioration of yield prospects. Simultaneous to the drought in parts of the east, the system brought persistent,

general rains to the westernmost parts of European USSR. Good rains have fallen in the southern North Caucasus from late April to the present. Much of the rest of western USSR experienced occasional showers and the crop is not under stress. Possibly helping the crop avoid stress conditions is the increase in fallow over the last several years. For example, last fall it was reported that two-thirds of the winter grains in the Ukraine would be seeded on land that had been fallowed the previous season. Currently only the Middle and Lower Volga, the eastern Central Black Soil Zone and the northeastern North Caucasus remain serious causes for concern regarding yield prospects.

May temperatures in European USSR averaged about $2^{o}$-$4^{o}$ C above normal. These temperatures, combined with a mild winter, caused grain crops to develop ahead of the normal pace -- about 2 weeks faster in the southern areas and 3 weeks faster in the north. Winter wheat in the south, where heading usually occurs May 20-June 10 in major areas, now is in the grain formation and filling stages. In the north, heading and flowering are taking place. June 20 is the average date for heading. Reports of lodging have been noted in the western Ukraine and North Caucasus, indicating not only the stage of crop development but also possibly the level of yields that might be expected. (In the USSR,lodging is usually associated with high yields. Soviet yields are officially in terms of bunkerweight, which is the weight of the material coming from the combine bin.) The persistent rainfall in the western Ukraine in May possibly could be causing problems with weeds.

In the New Lands, including some of the marginal areas of the southeast, conditions have been unusually good in early June. With the exception of parts of the western New Lands, which were on the periphery of the high pressure system that brought high temperatures to the Lower Volga, May generally was cooler than usual in this major grain area east of the Urals. The cooler temperatures, plus above-average moisture in some areas, caused some seeding delays but Kazakhstan reported planting had been completed within the optimal period and 15 million hectares of spring wheat, "significantly more than planned." Possibly this overplan in seeding was the consequence of: 1. less-than-desired prospects in some of the winter wheat areas; 2. probable losses of spring wheat in parts of the Volga as the result of the drought; 3. generally favorable moisture conditions in Kazakhstan; and 4. delays in planting caused by rains and cool temperatures throughout most of May in contiguous areas in western Siberia. Currently, the New Lands are experiencing near optimal conditions since there have been good rains in the west where it was dry earlier and temperatures there have returned to around normal with the dissipation of the high pressure system. Meanwhile, in the east, where it has been wet, temperatures have risen to normal or slightly above-normal levels. The extent to which planting may have been delayed here puts the crop at risk at harvest time.

The Soviet spring seeding progress report as of June 4 stated 83.6 million hectares of small grains and pulses had been planted. Also, 4 million hectares, all in Siberia, remained to be planted. Wet, cool weather caused similar delays in some of these same areas in 1983. The long-term average of spring grain seeding for June 4 is 85.4 million hectares.

## 1984/85 USSR Import Estimate Unchanged

The Soviets have recently entered the marketplace for significant quantities of grain for delivery in 1984/85. Canada, Argentina and the EC are thought to have participated in this activity with recent USSR purchases estimated at around 5 - 6 million tons. Soviet grain imports for this period currently are estimated at 35 million tons; including 20 million wheat, 14 million coarse grains and around 1 million rice and miscellaneous grains. At this level, Soviet total grain imports would be the second largest on record, marking the fifth consecutive year that Soviet imports have exceeded 30 million tons.

Projected wheat imports of 20 million tons for 1984/85 mark continuation of heavy Soviet dependence on the international wheat market. Grain trading agreements provide for minimum Soviet purchases of around 10 million tons of wheat. The Soviets have grain trading agreements or arrangements, which include wheat, with the United States, Canada, Hungary and France. With all of the world's major wheat exporters faced with large supplies in 1984/85, the Soviets will be able to pick and choose among the various wheat suppliers for the balance of their import needs. Over the past 3 years, shipments by the major suppliers to the USSR have averaged: United States, 4.8 million tons; Canada, 5.7 million; Australia, 1.6 million; Argentina, 3.6 million; and the EC, 2.9 million. In 1983/84, U.S. trade fell short of this level while shipments from the EC substantially exceeded the average.

Soviet coarse grain imports, projected at 14 million tons, would be up somewhat from the level of the past 2 years, but still well below the high levels of a few years back. Non-feed use of coarse grains typically accounts for around 20 million tons, with feed use, depending on supply availability, totaling 70-80 million. Last year's improved crop permitted the Soviets to hold down coarse grain imports, however, with crop prospects not as favorable this year, imports are expected to increase. Grain agreements with various suppliers assure the Soviets access to around 10 million tons of coarse grain annually. The Soviets have grain agreements or trading arrangements covering coarse grains with the United States, Canada, Argentina, Brazil and Thailand.

In recent years, Soviet production of usable grain has averaged only 162 million tons (Soviet grain production is typically reported as bunker-weight, therefore an allowance for dockage and waste must be made). Initially, the Soviets were able to draw from stocks; however, a series of poor crops likely reduced stockpiles and forced the Soviets to become more dependent on imports. In most years, the Soviets require around 80 million tons of grain for seed, industrial uses and food to meet non-feed requirements. In addition, around 120 million tons of grain have moved into livestock feed annually. This annual total requirement of about 200 million tons has to be met with either domestic production or imports.

## 1983/84 USSR Import Estimate Increased

Based on purchases to date, the estimate of Soviet grain imports for 1983/84 has been increased by 2 million tons to 33 million. The estimate of wheat imports continues at 20 million; coarse grain has been increased from 10 million to around 12 million; and rice and miscellaneous grains account for the balance. The continued slow pace in wheat exports from Canada has been offset by somewhat heavier-than-expected shipments from the other suppliers. The increase in coarse grain imports is attributable to accelerated Argentine coarse grain sales and shipments and to a larger allowance for East European coarse grain shipments. These late-season heavy coarse grain imports may reflect Soviet concern about the outlook for early 1984 coarse grain supplies as the crop outlook deteriorates.

## Domestic Use Estimate Unchanged

The estimate of domestic grain use in the USSR for 1984/85 remains at the month-earlier level of around 225 million tons. However, an adjustment has been made in utilization estimates for wheat and coarse grains, reflecting the shifts in crop prospects.

With a crop of 190 million tons and the second heaviest imports on record, the Soviets still are expected to have only enough grain to provide for a modest growth in utilization, and any significant rebuilding of stocks likely will have to be delayed. If world grain prices are attractive enough, the Soviets could increase imports, permitting them to stock more of their own domestic production.

## Soviet Livestock Sector Continues to Improve

For the January-April 1984 period, beef, pork, and poultry production increased 6, 16, and 7 percent, respectively, over last year. Egg production continued to increase--up 4 percent from a year earlier. The substantial increase in the quantity and quality of feed in 1983 is one factor in the 8-percent increase in meat production on state and collective farms in the first four months of 1984, and the continued building of livestock inventories. Non-concentrate feed suplies are forecast to be no better than last year's record production. Therefore, grain primarily will account for any increase in feed supplies.

USSR LIVESTOCK PRODUCTION ON STATE AND COLLECTIVE FARMS
JANUARY-APRIL, 1980-84
1,000 TONS

| Product | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| Total Meat | 4,953 | 4,948 | 4,865 | 5,172 | 5,595 |
| Beef | 3,175 | 3,097 | 3,017 | 3,149 | 3,333 |
| Pork | 1,175 | 1,204 | 1,143 | 1,250 | 1,444 |
| Sheep & Goats | 134 | 129 | 139 | 135 | 138 |
| Poultry | 470 | 518 | 566 | 638 | 680 |
| Milk | 18,211 | 17,831 | 17,092 | 19,059 | 20,094 |
| Eggs (Millions) | 14,620 | 15,661 | 16,021 | 17,023 | 17,666 |

USSR LIVESTOCK INVENTORIES ON STATE AND COLLECTIVE FARMS
MAY 1, 1984

| Product | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| | Million Head | | | | |
| Total Cattle | 93.4 | 94.1 | 94.5 | 95.9 | 97.9 |
| Cows | 29.7 | 29.8 | 29.9 | 29.9 | 29.8 |
| Hogs | 55.0 | 55.6 | 55.0 | 57.4 | 59.2 |
| Sheep & Goats | 148.0 | 148.2 | 146.5 | 147.2 | 148.7 |
| Poultry | 688.0 | 730.6 | 746.8 | 768.3 | 781.0 |

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1984/85

| Year | Production | Trade (Jul/Jun) Imports | Trade (Jul/Jun) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | (Million Metric Tons) | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Projected 1983/84 | 195 | 33.0 | 0.5 | 227 | 222 | 27 | 4 | 47 | 21 | 123 | +5 |
| Projected 1984/85 | 190 | 35.0 | 1.0 | 224 | 224 | 27 | 4 | 48 | 20 | 125 | 0 |
| Projected Variability 7/ | (±20) | (±5) | (±.5) | | (±10) | | | | | | (±6) |
| | | | | | Wheat | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Projected 1983/84 | 78 | 20.0 | 0.5 | 97 | 94 | 15 | 1 | 36 | 9 | 33 | +3 |
| Projected 1984/85 | 85 | 20.0 | 1.0 | 104 | 104 | 15 | 1 | 37 | 9 | 42 | 0 |
| Projected Variability 7/ | (±15) | (±5) | (±.5) | | (±7) | | | | | | (±5) |
| | | | | | Coarse Grains | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Projected 1983/84 | 105 | 12.1 | -- | 117 | 115 | 11 | 3 | 7 | 11 | 83 | +2 |
| Projected 1984/85 | 94 | 14.0 | -- | 108 | 108 | 11 | 3 | 7 | 10 | 77 | 0 |
| Projected Variability 7/ | (±17) | (±4) | | | (±8) | | | | | | (±3) |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.
7/ The indicated variation around the projections in this report should encompass final outcomes about two out of three times.

FAS, Grain and Feed Division
June 11, 1984

USSR Grain Area, Yield, and Production
1975-1980,
1981-1982 (Preliminary), 1983 (Estimate)
and 1984 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
|---|---|---|---|
| Wheat | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Estimate) | 50.4 | 1.55 | 78.0 |
| 1984 (Forecast) | 53.0 | 1.60 (±.25) | 85.0 (±15) |
| Coarse Grains 2/ | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Estimate) | 62.4 | 1.68 | 105.0 |
| 1984 (Forecast) | 59.0 | 1.61 (±.25) | 94.0 (±17) |
| Total Grain 3/ | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Estimate) | 121.5 | 1.65 | 195.0 |
| 1984 (Forecast) | 121.0 | 1.57 (±.15) 4/ | 190.0 (±20) 4/ |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.
4/ The indicated variation around the projections in this report should encompass final outcomes about two out of three times.

USSR IMPORTS OF WHEAT AND COARSE GRAINS BY SOURCE 1972/73-1983/84
July/June Years
(Million Metric Tons)

| | 1972/73 | 1973/74 | 1974/75 | 1975/76 | 1976/77 | 1977/78 | 1978/79 | 1979/80 | 1980/81 | Prelim. 1981/82 | Prelim. 1982/83 | Project. 1983/84 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Wheat | | | | | | | | | | | | |
| U.S. 1/ | 9.5 | 2.7 | 1.0 | 4.0 | 2.9 | 3.3 | 2.9 | 3.9 | 3.0 | 6.9 | 3.0 | 4.2 |
| Canada | 4.2 | 1.6 | .3 | 3.2 | 1.2 | 1.7 | 2.0 | 2.1 | 4.5 | 4.8 | 7.0 | 5.2 |
| Australia | .9 | .1 | .6 | 1.2 | .4 | .3 | .1 | 2.7 | 2.5 | 2.4 | 1.0 | 1.5 |
| Argentina | .7 | -- | .6 | 1.2 | .1 | 1.1 | -- | 2.0 | 3.0 | 3.1 | 4.2 | 3.6 |
| EC | .7 | -- | -- | -- | -- | -- | -- | .7 | .9 | 1.7 | 3.4 | 3.5 |
| Others | .3 | .1 | -- | .4 | -- | .2 | .1 | .6 | 2.1 | .6 | 1.6 | 2.0 |
| TOTAL* | 15.6 | 4.5 | 2.5 | 10.1 | 4.6 | 6.7 | 5.1 | 12.1 | 16.0 | 19.5 | 20.2 | 20.0 |
| Coarse Grains | | | | | | | | | | | | |
| U.S. 1/ | 4.2 | 5.2 | 1.3 | 9.9 | 4.5 | 9.2 | 8.3 | 11.3 | 5.0 | 8.5 | 3.2 | 6.0 |
| Canada | .9 | .2 | -- | 1.3 | .2 | .2 | .1 | 1.3 | 2.3 | 4.4 | 1.8 | .6 |
| Australia | -- | -- | .1 | .8 | .1 | -- | -- | 1.3 | .4 | .1 | -- | -- |
| Argentina | .1 | .3 | 1.1 | .2 | .2 | 1.6 | 1.4 | 3.1 | 8.2 | 10.2 | 5.4 | 4.1 |
| EC | 1.2 | .5 | .1 | .5 | .2 | .2 | .2 | .2 | .6 | .7 | .3 | .2 |
| Others | .5 | .2 | .1 | 2.6 | .3 | .6 | -- | 1.2 | 1.5 | 1.6 | .6 | 1.2 |
| TOTAL* | 6.9 | 6.4 | 2.7 | 15.6 | 5.7 | 11.7 | 10.0 | 18.3 | 18.0 | 25.5 | 11.3 | 12.1 |
| Total | | | | | | | | | | | | |
| U.S. 1/ | 13.7 | 7.9 | 2.3 | 13.9 | 7.4 | 12.5 | 11.2 | 15.2 | 8.0 | 15.4 | 6.2 | 10.2 |
| Canada | 5.1 | 1.8 | .3 | 4.5 | 1.4 | 1.9 | 2.1 | 3.4 | 6.8 | 9.2 | 8.8 | 5.8 |
| Australia | .9 | .1 | .7 | 2.0 | .5 | .3 | .1 | 4.0 | 2.9 | 2.5 | 1.0 | 1.5 |
| Argentina | .1 | .3 | 1.7 | 1.4 | .3 | 2.7 | 1.4 | 5.1 | 11.2 | 13.3 | 9.6 | 7.7 |
| EC | 1.9 | .5 | .1 | .5 | .2 | .2 | .2 | .9 | 1.5 | 2.4 | 3.7 | 3.7 |
| Others | .8 | .3 | .1 | 3.0 | .3 | .8 | .1 | 1.8 | 3.6 | 2.2 | 2.2 | 3.2 |
| TOTAL* | 22.5 | 10.9 | 5.2 | 25.7 | 10.3 | 18.4 | 15.1 | 30.4 | 34.0 | 45.0 | 31.5 | 32.1 |

-- Denotes less than 50,000 tons.
* Totals may not add due to rounding. Excludes rice and pulses. Included grain equivalent of flour.
1/ U.S. exports based upon Export Sales data, which normally include transshipments whereas Census data may not.

SOURCE: Based on reports of countries exporting to the USSR.

FAS, Grain and Feed Division

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | -- | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
| Jul-Sep | --- | 2,235 | --- | 45 | 1,773 | 4,053 | 5,100 |
| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 326 | 838 | 2,308 | |
| February | 944 | 36 | 346 | 362 | 1,030 | 2,718 | |
| March | 1,521 | 18 | 250 | 350 | 1,018 | 3,157 | |
| Jan-Mar | 3,328 | 79 | 852 | 1,038 | 2,886 | 8,183 | 9,100 |
| April | 1,768 | 355 | 376 | 100 3/ | 636 | 3,235 | |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

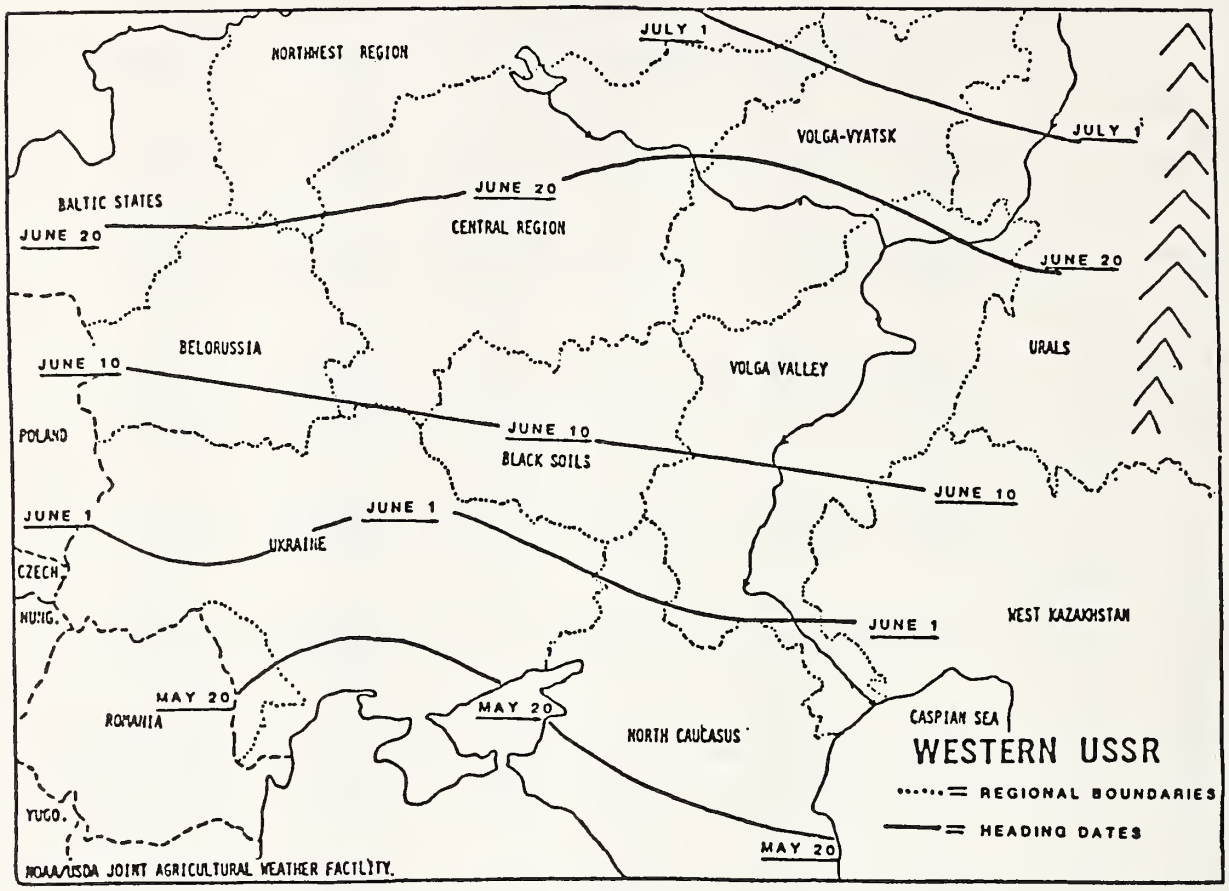
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

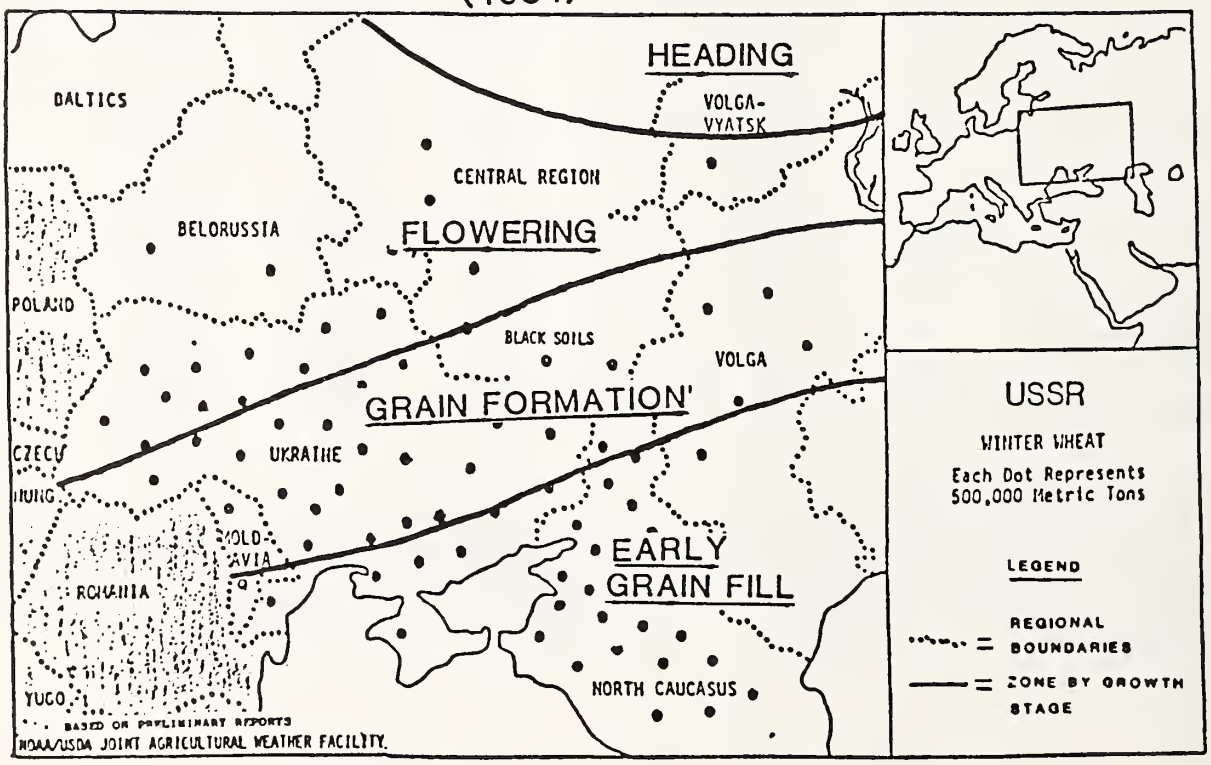
N/A Not Available

FAS, Grain and Feed Division

## AVERAGE DATES FOR THE START OF WINTER WHEAT HEADING




## WINTER WHEAT CROP PROGRESS BY EARLY JUNE (1984)



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SG-9-84
July 11, 1984

# The USSR Grain Situation and Outlook

The 1984/85 Soviet grain outlook has undergone several changes in the past month. Recent weather developments have prompted a modest upward revision in the wheat crop estimate while projected coarse grain output has been reduced. The Soviet's continued presence in the world wheat market has prompted a 3-million-ton increase in estimated Soviet wheat imports. Total Soviet grain imports in 1984/85 are now estimated at 38 million tons, the second largest on record. This year's heavy grain imports not only will help meet consumption requirements, but likely will permit the Soviets to add slightly to grain stocks for the second consecutive year. An expanding livestock sector and the likelihood of smaller non-grain feed supplies is likely strengthening grain import demand.

## Wheat Crop Estimate Increased; Total Unchanged

The 1984 Soviet grain crop forecast continues at 190 million tons, as slightly improved overall yield prospects during the last month offset a small decline in the estimated area. The estimated shifts in yields and areas resulted in a slightly changed composition of the total grain crop. Wheat production is forecast at 86 million tons, up from 85 million, coarse grain output is estimated at 92.5 million down from 94 million and the production of miscellaneous grains and pulses is put at 11.5 million, up slightly from 11.0 million. Primarily because of prospects for higher bunkerweights for winter wheat, especially in the western Ukraine and southern North Caucasus, estimated output of all winter grains has been raised to 59.8 million tons, up from 58.5 million last month. Because of expected lower area and yields for corn and barley, spring grain production is forecast at 130.2 million tons, down from 131.5 million.

Conditions during the last month in the western USSR were more favorable than in May, when high pressure over the Volga Valley severely limited precipitation. European USSR was relatively cool in the last 30 days, causing maturation of the crop to slow. In the western Ukraine, temperatures averaged 2.5° C below normal in June, and were 1° C below normal in the north and central regions and near normal in the southeastern sections. On some days in late June very hot weather (35° C) occurred in the eastern Ukraine, eastern Central Black Soil Zone, northern North Caucasus and Lower Volga. Precipitation in these areas in June was spotty and well below normal. This affected yield potential of corn, still in the vegetative stage, and spring barley which reached the filling stage in

mid-June. The Upper Volga, Volga Vyatsk and southern North Caucasus all received good rains in the last 30 days. In the western regions of the country, including the western third of the Ukraine, parts of Moldavia, Belorussia and the Baltics, heavy rainfall occurred. The rain was excessive, up to 200 mm in places, and very likely affected the quality of the winter wheat which is nearly ready for harvest. Yields, calculated according to the Soviet bunkerweight system, probably increased, however. June was a favorable month for crop development in the New Lands. Precipitation was above normal in some of the eastern regions where it also was cool, with temperatures averaging near normal for the month. In the west, mainly in that part of Kazakhstan nearest the Urals, June temperatures were slightly above normal and precipitation was timely. In early July, however, weather there has become unseasonably hot and dry. Spring wheat in that region is in the early stages of heading and is approaching flowering when moisture requirements are high.

The estimated 1984 harvest area has been lowered to 120.5 million hectares, slightly below the 121.0 million carried since the beginning of the season. Spring grains--barley, corn and rice--comprise the reduction of 500,000 hectares. It has been reported that the area under fallow this year is 21-22 million hectares, up substantially from the 19.5 million in 1983, which would indicate a smaller cropped area for the current harvest.

In the abbreviated official statistical handbook, "The USSR in Figures, 1983," the total area for last year's grain crop is given as 120.8 million hectares, slightly less than the 121.5 million estimated by USDA. No production or yield data were given. USDA has adjusted the Soviet area figure; however, the small difference between estimated and final area figures does not warrant changing the estimate of the 1983 harvest which remains at 195 million tons, including 78 million of wheat, 105 million of coarse grains, and 12 million of miscellaneous grains and pulses.

The harvest progress report of July 2 shows the pace is about a week behind that of last year but ahead of that of 1980-82. Small grains and pulses have been cut on 3.8 million hectares; of that, 2.1 million had been threshed. Comparable data for 1983 were 10.9 million hectares and 6.4 million, respectively. As usual, the official press stresses the need for proper readiness of harvesting equipment and machinery.

## USSR Import Estimate Increased

The Soviet grain import estimate for the 1984/85 marketing year has been increased by 3 million tons to 38 million, the second highest on record. Recent significant Soviet wheat purchases have prompted an increase in estimated 1984/85 wheat imports of 3 million tons to an all time high of 23 million. The estimate of coarse grain imports continues at 14 million tons, while miscellaneous grains, rice and pulses are expected to account for the balance. Recent Soviet purchases of U.S. wheat, totaling close to 2 million tons, brings total estimated Soviet buying from all sources for the 1984/85 marketing year to around 8 million tons. This is well ahead of the early-season pace of Soviet purchases over the past 3 years. Wheat likely has accounted for nearly 80 percent of the Soviets' early season grain buying.

Recent Soviet purchases appear to cover their expected imports for the first quarter of the July-June marketing year. In recent years, when Soviet imports annually exceeded 30 million tons, imports during the July-September period have averaged more than 7 million tons. With only modest amounts of grain available from the major Southern Hemisphere suppliers, and Canadian and EC shipping schedules fairly well set by earlier sales any significant additional Soviet grain buying for July-September shipment would have had to come from the United States. Reflecting this, the Soviets have purchased around 2 million tons of U.S. wheat since early July for shipment during this period.

A number of factors may be contributing to the heavy early season wheat buying, including: prospects for the fourth consecutive below-par wheat crop; some early season harvesting difficulties and possible resulting quality problems; and wheat's abundance and reasonable prices relative to corn. The Soviets may be taking advantage of current wheat prices to import wheat not only to meet current domestic milling needs but also to possibly help rebuild stocks. Soviet purchases of coarse grains, although slow to date, are likely to pick up as the 1984 U.S. corn crop becomes readily available and the tight world coarse grain supply eases.

## Domestic Use Holds; Stocks to Increase

Domestic grain use is projected to register another increase in 1984/85. Estimated grain utilization for most categories is projected to hold near the year earlier level. Food use of grain is projected to increase modestly this year while seed and industrial use is likely to continue at around 27 million and 4 million tons, respectively. The allowance for dockage and waste continues at about 10 percent of the crop, or 19 million tons. However, if harvesting difficulties persist, this could increase. The dockage and waste estimate represents an approximation of the amount of excess moisture and trash in the crop and any handling and storage losses. With the livestock sector continuing to expand and the forage outlook not as bright as a year ago, the demand for grain for feed is expected to increase in 1984/85, totaling around 125 million tons. Since hitting a recent low in 1981/82, feed use has steadily recovered. Wheat for feed this year is expected to return to a more traditional level of over 40 million tons, while coarse grain feed use is expected to total around 75 million tons.

The Soviets may be able to add modestly to year-ending stocks given this year's large grain imports. However, if poor harvesting weather should affect the quality of the Soviet wheat crop, more of it could move into feed increasing the demand for imported wheat, delaying any further build-up in stocks, and possibly reducing the demand for imported coarse grains.

## 1983/84 Trade and Use Estimates Unchanged

The pace of Soviet imports during the last few months of 1983/84 continued fairly heavy based on reports from supplying countries. May shipping data indicated total Soviet monthly imports in excess of 3 million tons for the fourth consecutive month. U.S. shipments continued to wind down, while Canadian wheat shipments surged. The Soviets continued to actively ship

Argentine coarse grains. No adjustments have been made in the estimates of 1983/84 utilization or trade.

## USSR Purchases Under LTA Increase

Soviet purchases through early July 1984 for the first year of the new LTA total over 12 million tons, including 6.3 million of wheat, and 6 million of corn. Under the agreement, the Soviets are to purchase from the United States, 9 million tons of wheat and corn annually. They may purchase 3 million tons of wheat and corn in addition to the 9 million without prior consultations. During an earlier consultation, the United States offered the Soviets access to an additional 10 million tons of U.S. grain, permitting the Soviets to buy up to 22 million tons during the first year of the agreement which ends September 30, 1984.

## Fodder Harvest Lags Year Ago

Early reports on this year's harvest of fodder crops indicates production of hay, haylage and grass meal all well behind the record 1983 pace. Area of grassland cut as of June 25 was about 23 million hectares, compared to the 1980-82 average of 19.0 million and the 1983 figure of 26.3 million. A more important factor, however, is the implied yield for fodder crop production. Yields are running slightly ahead of the 1980-82 average, but nearly 20 percent behind the outstanding results of last year. A continuation of this trend could result in additional pressures on grain-for-feed supplies in the months ahead.

USSR PRODUCTION OF FODDER CROPS AND GRASSLAND AREA CUT
(AS OF JUNE 25 1/--1980-82, 1983, 1984)

| | 1980-82 | 1983 | 1984 |
|---|---|---|---|
| | Million Hectares | | |
| Grassland Area Cut | 19.0 | 26.3 | 23.0 |
| | Million Tons | | |
| Hay | 8.9 | 18.4 | 10.8 |
| Haylage | 17.6 | 26.9 | 22.8 |
| Grass Meal | 1.3 | 2.2 | 1.6 |
| TOTAL (In Oat Unit Equiv. 2/) | 11.8 | 19.27 | 13.96 |

1/ Data for 1980-83 are interpolated.
2/ Using the following oat unit conversions: hay, 0.45; haylage, 0.34; grass meal, 0.84.

## Livestock Production Continues Up

Meat production (liveweight) during the first 5 months of 1984, on state and collective farms, continued to make impressive strides, exceeding the high output levels of most types of meat during the same period in 1983. Beef, veal, pork, and poultry meat set new records. The largest percentage gain (15 percent) was made in pork--a direct result of record inventories together with an increase in average slaughter weights of hogs. During January-April 1984, for instance, cumulative average slaughter weights of

hogs reportedly rose by 4 kilograms over a year-earlier, to 107 kilograms--the highest for this period since 1977. The 6-percent rise in beef and veal also was the result of record cattle inventories and higher average slaughter weights, which during January-April rose by 12 kilograms to 370 kilograms--the highest cumulative average weight for this period since 1979.

USSR LIVESTOCK INVENTORIES ON STATE AND COLLECTIVE FARMS
JUNE 1, 1984

| Product | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| | Million Head | | | | |
| Total Cattle | 94.0 | 94.8 | 95.4 | 96.8 | 98.7 |
| Cows | 29.8 | 29.9 | 30.0 | 29.9 | 29.9 |
| Hogs | 55.6 | 56.3 | 55.8 | 58.6 | 60.1 |
| Sheep & Goats | 148.8 | 148.5 | 146.4 | 148.2 | 148.6 |
| Poultry | 708.9 | 741.8 | 757.7 | 778.8 | 794.0 |

## Soviets Release Official Kazakhstan Production Data

The last crop for which official yield or production data were issued by the Soviet Union was harvested in 1980. Recently, however, the 1983 annual statistical yearbook was released by the Republic of Kazakhstan, and it contains grain production data for 1981 and 1982. Kazakhstan is an integral part of the New Lands and primarily produces spring-seeded small grains, especially wheat and barley. After the RSFSR and Ukraine, it is the third largest grain growing republic in the Soviet Union. Aggregated into wheat, coarse grains, and miscellaneous grains and pulses--the categories used by USDA--the 1981 and 1982 production data for Kazakhstan follow. To put Kazakh production into perspective, comparison for the 1976-1980 period also are presented. (1976-1980 is the last period for which official total USSR production figures are available.)

Kazakh and USSR Grain Production
(million metric tons)

| | Kazakhstan | | | USSR |
|---|---|---|---|---|
| Commodity | 1981 | 1982 | 1976-80 Average | 1976-80 Average |
| Wheat | 15.4 | 12.4 | 19 | 100 |
| Coarse Grains | 7.6 1/ | 6.3 2/ | 8 3/ | 95 4/ |
| Miscellaneous Grains and Pulses | 0.8 | 0.8 | 1 | 10 |
| Total | 23.8 | 19.5 | 27 5/ | 205 |

1/ Includes 6.0 MMT barley.
2/ Includes 4.8 MMT barley.
3/ Includes 6.2 MMT barley.
4/ Includes 55 MMT barley.
5/ Does not add because of rounding.

Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1984/85

| Year | Production | Trade (Jul/Jun) Imports | Trade (Jul/Jun) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | (Million Metric Tons) | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Projected 1983/84 | 195 | 33.0 | 0.5 | 227 | 222 | 27 | 4 | 47 | 21 | 123 | +5 |
| Projected 1984/85 | 190 | 38.0 | 1.0 | 227 | 224 | 27 | 4 | 48 | 20 | 125 | +3 |
| Projected Variability 7/ | (±20) | (±5) | (±.5) | | (±10) | | | | | | (±6) |
| | | | | | Wheat | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Projected 1983/84 | 78 | 20.0 | 0.5 | 97 | 94 | 15 | 1 | 36 | 9 | 33 | +3 |
| Projected 1984/85 | 86 | 23.0 | 1.0 | 108 | 105 | 15 | 1 | 37 | 9 | 43 | +3 |
| Projected Variability 7/ | (±15) | (±5) | (±.5) | | (±7) | | | | | | (±5) |
| | | | | | Coarse Grains | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Projected 1983/84 | 105 | 12.1 | -- | 117 | 115 | 11 | 3 | 7 | 11 | 83 | +2 |
| Projected 1984/85 | 92 | 14.0 | -- | 106 | 106 | 11 | 3 | 7 | 10 | 75 | 0 |
| Projected Variability 7/ | (±17) | (±4) | | | (±8) | | | | | | (±3) |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.
7/ The indicated variation around the projections in this report should encompass final outcomes about two out of three times.

FAS, Grain and Feed Division

USSR Grain Area, Yield, and Production
1975-1980,
1981-1982 (Preliminary), 1983 (Estimate)
and 1984 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
|---|---|---|---|
| Wheat | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Estimate) | 50.0 | 1.56 | 78.0 |
| 1984 (Forecast) | 53.0 | 1.62 | 86.0 |
| Coarse Grains 2/ | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
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| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
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| 1984 (Forecast) | 58.6 | 1.58 | 92.5 |
| Total Grain 3/ | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Estimate) | 120.8 | 1.61 | 195.0 |
| 1984 (Forecast) | 120.5 | 1.58 | 190.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | -- | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
| Jul-Sep | --- | 2,235 | --- | 45 | 1,773 | 4,053 | 5,100 |
| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 326 | 838 | 2,308 | |
| February | 944 | 36 | 346 | 362 | 1,030 | 2,718 | |
| March | 1,521 | 18 | 250 | 350 | 1,018 | 3,157 | |
| Jan-Mar | 3,328 | 79 | 852 | 1,038 | 2,886 | 8,183 | 9,100 |
| April | 1,806 | 355 | 376 | 300 3/ | 636 | 3,473 | |
| May | 1,232 | 825 | 312 | 150 3/ | 933 | 3,452 | |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

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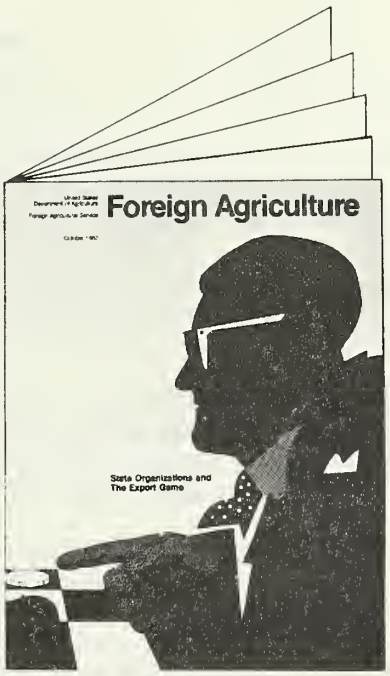


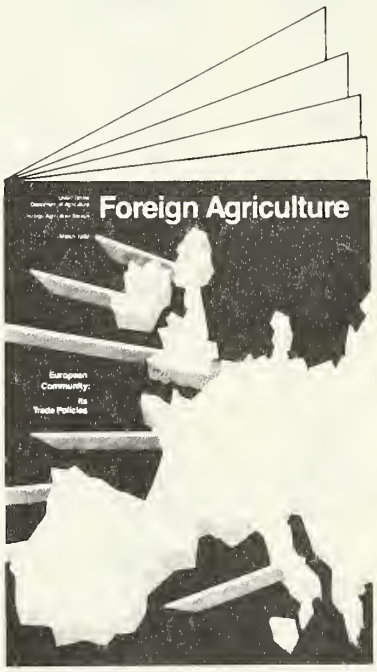


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SG-10-84
August 13, 1984

## THE USSR Grain Situation and Outlook

Demand for grain in the USSR in 1984/85 is expected to continue heavy, reflecting both large feed requirements from a strong livestock sector as well as a general increase in total demand. Continued deterioration in the 1984 Soviet grain crop along with heavy early season buying has prompted an increase in the 1984/85 import estimate to a near-record 43 million tons. It now is projected that the Soviets will also have to draw on stocks accumulated last year.

### Soviet Grain Imports Estimated Near Record Large

The estimate of Soviet grain imports for 1984/85 has been increased by 5 million tons to 43 million. Wheat imports now are forecast at a record 24 million tons, up 1 million from the month-earlier estimate and 3.5 million above the previous record set last year. Coarse grain imports now are estimated at 18 million tons, up 4 million from the month-earlier estimate and the highest in 3 years. Rice, miscellaneous grains and pulses account for the balance of the imports.

A number of factors are contributing to this years' near-record Soviet grain import estimate and to the heavy early season buying, including:

--Prospects for the 1984 grain crop have deteriorated, forcing the Soviets to turn increasingly to imports to maintain domestic consumption levels.

--A series of poorer-than-expected harvests, starting with the 1979 crop, has forced the Soviets to draw stocks down sharply. Last years' crop and large imports may have enabled them to add slightly to grain stocks during 1983/84, but any addition will likely be quickly consumed this year as crop prospects have dimmed. If the Soviets were to add to grain stocks in 1984/85, even larger imports than currently indicated would be likely .

--Livestock inventories continue at record or near record levels, although the rate of livestock expansion appears to be slowing. However, if the Soviets are to attain meat production goals, the livestock sector must continue to expand and grain supplies for feed must be maintained.

--After some early problems, the outlook for the forage harvest has improved. However, the quality of the 1984 forage crop could fall

short of last year's spectacular level. The good 1983 forage crop undoubtedly took some pressure off grain for feed supplies. However, with the forage outlook less optimistic in 1984/85, additional grain for feed will likely be needed.

--Reports of deteriorating crop prospects in some of the major wheat and coarse grain suppliers may have prompted the Soviets to move early to cover their exceptionally large 1984/85 grain import needs.

## Early Season Purchases Surge

The pace of Soviet grain buying since late June has been extremely heavy with the United States dominating the activity. Soviet grain purchases from all origins for the 1984/85 marketing year already are approaching 20 million tons, marking the heaviest ever early-season buying. Soviet buying in the U.S. market has been aggressive as purchases since late June have already exceeded 9 million tons. U.S. wheat sales have been heavy for shipment during the early months of the July/June year while the bulk of the corn purchases call for shipment after October 1 when U.S. new-crop supplies would be readily available.

## Coarse Grain Supplies Down From a Year Ago

The Soviets are expected to try to make up at least part of the shortfall in coarse grain production by heavy imports. The USSR is likely to minimize the impact of the smaller crop on the livestock sector by expanding imports, drawing on stocks and feeding more wheat. Coarse grain feed use is expected to fall sharply from the record level estimated for 1983/84.

Purchases of U.S. corn have been extremely heavy over the past few weeks. Virtually all of the corn bought to date is for delivery in the first half of the 1984/85 marketing year. With world barley supplies tightening and Southern Hemisphere exportable coarse grain supplies mostly sold out until the new crop becomes available, prospects for additional U.S. corn sales are good.

## Soviet Wheat Imports Estimated at Record

Total USSR wheat area is down from the large areas of the late 1970's and early 1980's. In addition, two major Soviet wheat producing areas have been hit by adverse weather. Consequently, USSR wheat production will be little better than last year's poor crop. Soviet wheat imports in the 1984/85 marketing year are projected at a record-shattering 24 million tons. In the months ahead, nearly 1 of every 4 tons of wheat moving in world commerce will go to the Soviets. The Soviets have already purchased around 11 million tons for shipment during 1984/85. The United States, Canada and France already have significant sales on the books to the USSR.

Domestic utilization of wheat in the USSR in 1984/85 is expected to recover from last years' reduced level as anticipated smaller supplies

of coarse grains open the way for additional wheat feeding. The Soviets are also expected to dip into any wheat stocks they may have accumulated this past year.

## Adjustments Made in 1983/84 Wheat Trade

The estimate of Soviet grain imports for 1983/84 has been reduced slightly, reflecting some late season adjustments in both wheat and coarse grain trade. Heavy June shipments from Canada helped push up the estimate of wheat imports while shipments of coarse grains, particularly from Argentina, fell short of expectations. Modest adjustments in domestic use were made to reflect these changes.

## Grain Utilization Continues High

Grain utilization (including dockage and waste) is estimated at 224 million tons, slightly above last year's level. Feed use of grain, estimated at 125 million tons, accounts for the increase. Yet, even at this record-equaling feeding level, grain supplies are likely to remain short of what the Soviets need to maintain recent livestock production growth rates through 1984 and into 1985. The estimated rate for dockage and waste has increased modestly to 11 percent compared with a normal level of 10 percent. Continued wet weather in portions of the European USSR where the harvest is well underway and numerous reports of lodging problems have led to the increase.

## Livestock Inventories Remain High

Mid-year (July 1, 1984) livestock inventories in the socialized sector were maintained at record or near-record levels, with the exception of sheep and goats. Cattle inventories at a record 98.3 million head were up by 2 million but cow numbers, at 29.9 million, were slightly down from a year earlier probably because of less favorable foraging. Poultry inventories rose by 11.8 million to a record 778 million. Hog inventories continue to make good gains, rising by a million head to a record 60 million. Sheep and goat numbers, at 143.6 million head, fell 100,000 head from a year earlier and were 3.2 million head less than the record reached on July 1, 1975.

Based on monthly changes in livestock numbers between June 1 and July 1, 1984, poultry appeared to undergo heavier-than-normal slaughter. Slaughter levels of other livestock were close to normal. The

drawdown of 16 million head of poultry this June (versus a drawdown of 12.6 million in June 1983) was the heaviest June slaughter on record and could have resulted from culling flocks.

USSR LIVESTOCK INVENTORIES ON STATE AND COLLECTIVE FARMS
JULY 1, 1984

| Product | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| | Million Head | | | | |
| Total Cattle | 93.5 | 94.3 | 94.9 | 96.3 | 98.3 |
| Cows | 29.9 | 30.0 | 30.1 | 30.0 | 29.9 |
| Hogs | 56.0 | 56.9 | 56.6 | 59.3 | 60.3 |
| Sheep & Goats | 143.9 | 143.9 | 141.5 | 143.7 | 143.6 |
| Poultry | 704.0 | 735.7 | 751.1 | 766.2 | 778.0 |

## 1984 Grain Crop Estimate Cut

The 1984 Soviet grain crop is estimated at 180 million tons, down from the 190-million-ton estimate of July. The 10-million-ton reduction includes 6 million in wheat, 3.5 million in coarse grains, and 500,000 in the category of miscellaneous grains and pulses. The lower estimate is the result of reduced yield expectations caused primarily by hot, dry weather in July in major spring grain areas east of the Volga River, particularly in the southern Urals and western Kazakhstan. This weather hit the crop at the critical reproductive stage. Estimated winter grain production remains at 59.8 million tons; the spring grain estimate is 120.2 million tons, down sharply from the 130.2 million last month. At 180 million tons, the 1984 crop would be well below the official target of 240 million, but about the same as the average of the last three estimated crops. The 1984 harvest area still is estimated at 120.5 million hectares.

The dominant factor affecting this crop estimate was the spell of unseasonably hot, dry weather that hit the western New Lands, primarily the southern Urals and western Kazakhstan, in early July. This area accounts for about 40 percent of Soviet spring wheat output and is also an important barley-producing area. Maximum temperatures were in the mid-30's (C.) the second week of July, which was critical since the spring wheat was heading and flowering. Temperatures averaged 2 - 3 degrees C. above normal. Yield prospects could have been damaged more but cool nights, gave the plants some relief, and relatively little wind was associated with the high temperatures. However, on July 9 - 12, wind speeds reached 15 knots an hour. The area affected by these conditions received less than 10 millimeters of precipitation in July, when rainfall is usually maximum. June rainfall in the area was also below normal. Indicative of how crop development had been accelerated, by July 20 it was announced in Orenburg (in southern Urals) that the rye, barley and wheat crops would be harvested simultaneously. Spring wheat yields in the western Newlands average 10-15 percent more than in the east where prospects remain excellent. This may not be realized, however,

because temperatures have been a bit cooler than normal, which will retard maturation. The normal date of first frost is about September 10.

In European USSR, July weather also was generally similar to June--above average precipitation and cooler-than-normal temperatures. The southern and eastern Ukraine, however, received only about half the normal precipitation, affecting corn yield prospects. In southern North Caucasus and Moldavia, though, the outlook was very favorable. Reports of weedy and light stands of winter grains have come from some areas in the Central Black Soils Zone that were dry in the fall and spring. The Ukraine, in general, has a better crop than in 1983, but recent reports state there are serious problems with wet grain. This is primarily in the northcentral region. Anticipated possible problems of lodging and interference with the harvest caused by broadscale wet conditions have not occurred. While there have been local problems with quality, the Ukraine has reported that its plan to deliver high quality bread wheat is over 95 percent fulfilled.

The harvest report for small grains and pulses as of August 6 stated 43.0 million hectares had been cut and 37.4 million had been threshed. The report indicated that the pace had slowed as the main harvest moved northward in European USSR because during the week of July 31 - August 6, only 8.3 million hectares had been cut, the smallest area for that week in the last 5 years.

Weather conditions over much of the north, especially in the Central Region and east toward the western Urals, have not favored harvesting operations in the last 2 weeks. Cool temperatures and light rains have prevailed. By the end of July, all the small grains were reported in some stage of ripeness.

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Prepared by the USDA Interagency Task Force on the USSR Grain Situation

USSR Grain Area, Yield, and Production
1975-1980,
1981-1982 (Preliminary), 1983 (Estimate)
and 1984 (Forecast)

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| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Estimate) | 120.8 | 1.61 | 195.0 |
| 1984 (Forecast) | 120.5 | 1.49 | 180.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1984/85

| Year | Production | Trade (Jul/Jun) Imports | Trade (Jul/Jun) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | (Million Metric Tons) | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Prelim. 1983/84 | 195 | 32.9 | 0.5 | 227 | 222 | 27 | 4 | 47 | 21 | 123 | +5 |
| Projected 1984/85 | 180 | 43.0 | 1.0 | 222 | 224 | 27 | 4 | 48 | 20 | 125 | -2 |
| | | | | | Wheat | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Prelim. 1983/84 | 78 | 20.5 | 0.5 | 98 | 95 | 15 | 1 | 36 | 9 | 34 | +3 |
| Projected 1984/85 | 80 | 24.0 | 1.0 | 103 | 103 | 15 | 1 | 37 | 9 | 41 | 0 |
| | | | | | Coarse Grains | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Prelim. 1983/84 | 105 | 11.5 | -- | 116 | 114 | 11 | 3 | 7 | 11 | 82 | +2 |
| Projected 1984/85 | 89 | 18.0 | -- | 107 | 109 | 11 | 3 | 7 | 10 | 78 | -2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.
7/ The indicated variation around the projections in this report should encompass final outcomes about two out of three times.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | -- | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
| Jul-Sep | --- | 2,235 | --- | 45 | 1,773 | 4,053 | 5,100 |
| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 326 | 838 | 2,308 | |
| February | 944 | 36 | 346 | 362 | 1,030 | 2,718 | |
| March | 1,521 | 18 | 250 | 350 | 1,018 | 3,157 | |
| Jan-Mar | 3,328 | 79 | 852 | 1,038 | 2,886 | 8,183 | 9,100 |
| April | 1,806 | 421 | 376 | 300 3/ | 636 | 3,539 | |
| May | 1,232 | 879 | 312 | 150 3/ | 933 | 3,506 | |
| June | 255 | 1,124 | --- | 40 3/ | 612 | 2,031 | |
| April-June | 3,293 | 2,424 | 688 | 490 | 2,181 | 9,076 | 9,600 |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

USSR IMPORTS OF WHEAT AND COARSE GRAINS BY SOURCE 1976/77-1983/84
July/June Years
(Million Metric Tons)

| | 1976/77 | 1977/78 | 1978/79 | 1979/80 | 1980/81 | Prelim. 1981/82 | Prelim. 1982/83 | Prelim. 1983/84 |
|---|---|---|---|---|---|---|---|---|
| Wheat | | | | | | | | |
| U.S. 1/ | 2.9 | 3.3 | 2.9 | 3.9 | 3.0 | 6.9 | 3.0 | 4.4 |
| Canada | 1.2 | 1.7 | 2.0 | 2.1 | 4.5 | 4.8 | 7.0 | 5.8 |
| Australia | .4 | .3 | .1 | 2.7 | 2.5 | 2.4 | 1.0 | 1.6 |
| Argentina | .1 | 1.1 | -- | 2.0 | 3.0 | 3.1 | 4.2 | 3.6 |
| EC | -- | -- | -- | .7 | .9 | 1.7 | 3.4 | 3.6 |
| Others | -- | .2 | .1 | .6 | 2.1 | .6 | 1.6 | 1.5 |
| TOTAL* | 4.6 | 6.7 | 5.1 | 12.1 | 16.0 | 19.5 | 20.2 | 20.5 |
| Coarse Grains | | | | | | | | |
| U.S. 1/ | 4.5 | 9.2 | 8.3 | 11.3 | 5.0 | 8.5 | 3.2 | 6.0 |
| Canada | .2 | .2 | .1 | 1.3 | 2.3 | 4.4 | 1.8 | .5 |
| Australia | .1 | -- | -- | 1.3 | .4 | .1 | -- | .1 |
| Argentina | .2 | 1.6 | 1.4 | 3.1 | 8.2 | 10.2 | 5.4 | 3.3 |
| EC | .2 | .2 | .2 | .2 | .6 | .7 | .3 | .2 |
| Others | .3 | .6 | -- | 1.2 | 1.5 | 1.6 | .6 | 1.4 |
| TOTAL* | 5.7 | 11.7 | 10.0 | 18.3 | 18.0 | 25.5 | 11.3 | 11.5 |
| Total | | | | | | | | |
| U.S. 1/ | 7.4 | 12.5 | 11.2 | 15.2 | 8.0 | 15.4 | 6.2 | 10.4 |
| Canada | 1.4 | 1.9 | 2.1 | 3.4 | 6.8 | 9.2 | 8.8 | 6.3 |
| Australia | .5 | .3 | .1 | 4.0 | 2.9 | 2.5 | 1.0 | 1.7 |
| Argentina | .3 | 2.7 | 1.4 | 5.1 | 11.2 | 13.3 | 9.6 | 6.9 |
| EC | .2 | .2 | .2 | .9 | 1.5 | 2.4 | 3.7 | 3.8 |
| Others | .3 | .8 | .1 | 1.8 | 3.6 | 2.2 | 2.2 | 2.9 |
| TOTAL* | 10.3 | 18.4 | 15.1 | 30.4 | 34.0 | 45.0 | 31.5 | 32.0 |

-- Denotes less than 50,000 tons.
* Totals may not add due to rounding. Excludes rice and pulses. Included grain equivalent of flour.
1/ U.S. exports based upon Export Sales data, which normally include transshipments whereas Census data may not.

SOURCE: Based on reports of countries exporting to the USSR.

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### The USSR Grain Situation And Outlook

The highlights of this month's review of the 1984/85 Soviet grain outlook are:

--Soviet crop prospects continue to deteriorate with the current estimate of the 1984 crop at 175 million tons, down significantly from last year's outturn and around 65 million below plan.

--Prospects for another poor wheat harvest with imports currently projected at a record 24 million tons.

--An increase in the estimate of 1984/85 coarse grain imports, reflecting further deterioration in the overall grain crop, the relatively lower prices of corn on the world market and heavy buying of corn, apparently for early shipment.

### 1984 Soviet Crop Estimate Reduced

The 1984 Soviet grain harvest is estimated at 175 million tons, down 5 million from last month's figure. The reduction is divided almost equally between wheat and coarse grains, now estimated at 78.0 million tons and 86.0 million, respectively. Miscellaneous grain production continues to be estimated at 11.0 million tons. The lower projections of wheat and coarse grain output reflects smaller area and slightly reduced yield prospects. Winter grains output is now estimated at 59.4 million tons, down only slightly from 59.8 million; the spring grain production estimate has been lowered to 115.6 million tons, down from 120.2 million a month ago. Within the coarse grain complex, the rye estimate was reduced by 400,000 tons, now standing at 14.5 million which, when combined with the wheat estimate, lowers the estimate of breadgrain production by a total of 2.4 million tons.

The projected harvested area for this year's grain crop is 120 million hectares, the smallest since 1972. In recent years, the Soviets have increased area of fallow in their cropping patterns. The Soviets consider 20-22 million hectares to be the optimum area for fallow. Pre-harvest losses of small grains appear larger than normal this year and prompt the reduction in yield estimates for the crop. With only

84.9 million hectares (three-fourths) of small grains and pulses cut (79.5 million threshed) as of September 3, the harvest is proceeding at the slowest pace since 1980. Also, it has been reported that fields ready for combining have had unduly long waits before harvesting. Consequently, excessive shattering in the swaths has resulted. It was reported earlier this year that combines were harvesting about one hectare, or approximately 10 percent, more per day than a year ago. This faster-than-optimal speed would also result in increased losses. There is evidence that a much larger share of this year's crop is being combined directly, rather than the customary method of swathing the grain and then threshing it from the windrow. Although there were two weeks of good harvesting weather in August, conditions, in general, have not been favorable because of rains and the usual problems of lodging, short straw and weeds, particularly in parts of European USSR and also parts of Western Siberia. Untimely rains at harvest time have caused the quality of the 1984 crop to be generally below average. In places, there has been evidence of sprout damage in grain still standing. According to Soviet press reports, post-harvest losses this year may be above average, too. For example, in part of the Ukraine there was not enough driers to handle the excessively wet grain harvest.

Most of the small grains remaining to be harvested are in the northern and eastern New Lands and the northern European USSR. While generally favorable weather conditions have covered the eastern New Lands since mid-August and the potential for good yields still exists, the likelihood of completing the harvest is in doubt as fall and winter approach. In these areas, cooler-than-normal temperatures for much of the season, above-average precipitation and planting a bit later than normal definitely put the crop at further risk.

Fall field work is progressing well, and it appears the early plantings of the winter grains are being made within the optimal period. As of September 3, plowing reportedly had been done on 24.1 million hectares, or 22 percent of the plan, and winter crops had been seeded on 17.2 million hectares, or 43 percent of plan. Conditions have been favorable and many localities have reported good emergence after recent rains.

## Grain Import Estimate Increased

The estimate of Soviet grain imports for 1984/85 has been increased by 3 million tons to 46 million, equaling the record set in 1981/82. The forecast of wheat imports is unchanged from a month ago at 24 million tons. However, the estimate of coarse grain imports has been increased to 21 million tons, second only to the record 25.5 million imported in 1981/82. Rice, miscellaneous grains and pulses account for the balance of the imports.

There are indications that the USSR will import grain at an unprecedented pace during the August-December 1984 period. If this pace can be achieved without significant backlogs at unloading and distribution points, if winter-time conditions are favorable, and if the unusually heavy purchasing and importing pace continues during

January-June, total volume for the year could exceed the 46-million-ton estimate. Also, judging from the intensity of the import program thus far, it appears likely that relatively heavy imports could continue well into the summer months of 1985.

## Wheat Imports Projected to be Record Large

Soviet wheat imports are projected at a record 24 million tons. A number of factors may be contributing to this high level, including:

--Early season wheat export prices which were quite competitive with coarse grains.

--A projection of Soviet wheat production which is one of the lowest since the disastrous 1975 crop.

--Poor crop prospects in much the New Lands, an important supply source for the Soviet milling industry.

--Continued reports that the quality of the 1984 crop is unlikely to be as good as earlier expected.

Even with the projected large imports, total wheat availability will be one of the lowest in recent years, reflecting the reduced harvest and the likelihood that stocks have been drawn down to relatively low levels. Total wheat utilization, projected at 101 million tons, would be about 5 percent below the average of the past 5 years. The amount of wheat used as feed is expected to increase from a year ago, but still be below the high level of the late 1970's and early 1980's. The Soviets are likely to have to forgo adding to wheat stocks this year.

## Estimate of Soviet Coarse Grain Imports Increased Again

The estimate of Soviet coarse grain imports has been increased by 3 million tons to 21 million; second only to the 1981/82 imports of 25.5 million. Soviet coarse grain imports for the first half of the 1984/85 marketing year are projected at over 11 million tons, based on heavy purchases of U.S. corn for October 1984 forward shipment. The pace of shipments typically slows during the January-March winter quarter, then picks up sharply during the last quarter of the marketing year as new crop supplies from the Southern Hemisphere come in and Soviet domestic supplies shrink. Even with large coarse grain imports, availability will still fall short of last year's exceptional level. The Soviets are expected to attempt to maintain the level of domestic consumption by large imports and drawing on a year ago's modest stock accumulation.

## U.S. Adjust Supplys Availability Up Under U.S.-USSR Bilateral Grain Agreement

Under the new 5-year U.S.-USSR Agreement, signed August 25, the USSR undertakes to buy at least 4 million tons of wheat and 4 million tons

of corn from the U.S. for shipment in each October-September year, plus an additional 1 million that can be satisfied by any combination of wheat, corn, soybeans or soybean meal. If the USSR chooses to apply soybeans or soybean meal to the minimum, each ton of soybeans or soybean meal counts as 2 of grain. The agreement also provides that before the USSR purchases above 12 million tons of wheat and corn for delivery in any October-September year, action must be taken to increase the supply availability in accordance with Article V of the agreement. Normally, such action is taken at the time of regular semi-annual consultations. However, this year, in light of heavy early season buying, and since regular consultations will not be held until late November, the United States initiated an adjustment of the 1984/85 supply level somewhat earlier than usual. On September 11, it was announced that the U.S. Department of Agriculture had communicated with the Soviet Ministry of Foreign Trade in accordance with the Agreement to raise the supply availability level for 1984/85 to 22 million tons. It has also been indicated that at the regular semi-annual consultations in November, the supply level could be reviewed further for adequacy.

As of September 10, 1984, Soviet purchases of U.S. grain for the first and second year of the new LTA stands as follows:

| | Oct-Sep 1983/84 | Oct-Sep 1984/85 |
|---|---|---|
| | 1,000 TONS | |
| Wheat | 7,763 | 1,356 |
| Corn | 6,625 | 7,399 |
| TOTAL | 10,407 | 8,755 |

## Soviet Buying Activity Continues Heavy

Soviet purchases of grain in the world marketplace continued fairly heavy over the past month with total commitments for shipment during the July-June marketing year approaching 25 million tons . The U.S. has been the largest seller, accounting for more than half the business. It appears that the USSR has already covered more than half of the projected wheat imports of 24 million tons. Coarse grain purchases, principally from the United States, have also exceeded 50 percent of the projected coarse grain imports.

## Forage Situation Continues to Improve

On the strength of a silage crop which is likely to match last year's outstanding harvest, laying in of non-grain feeds during August continued to gain ground on the 1983 record pace. As of August 27, supplies of hay, haylage, silage and grass meal--in oat-unit equivalent--were 7 percent behind those for the previous year compared with a 12-percent gap as of July 23. The quality of non-grain feeds could be down slightly from last year as indicated by the higher share of haylage relative to hay. However, no serious quality declines are anticipated.

## Grain Utilization Down Slightly

Grain-for-feed in 1984/85 is estimated at 124 million tons, up only 1 million from last year. With grain-for-feed estimated at 124 million tons, total feed supplies, in oat-unit equivalent, will be down less than 5 percent from 1983/84, and probably the second highest on record. Thus, while growth rates for livestock production, particularly pork, could slacken, feed supplies should still be sufficient to maintain livestock inventories during the current July-June year.

The estimate of dockage and waste has declined 1 million tons as a result of the smaller estimated harvest. The estimated dockage and waste rate remains at 11 percent, slightly above normal. In the northern Ukraine, Non-Black Soil Zone, end Belorussia, grain was probably wetter than normal coming from the fields. A primary indicator of this is behavior on state and collective farms. Farms receive lower prices for high-moisture grain. In many of the areas noted, farm managers apparently delayed selling grain to the state in hopes of bringing the moisture content down.

## Livestock Inventories Remain High

As of August 1, livestock inventories on state and collective farms were at record or near-record levels with the exception of sheep and goats. Relative to the same date in 1983, inventories of cattle, hogs and poultry were up a modest 1-2 percent. These year-on-year increases in inventories could shrink further in coming months. The decline in sheep and goat numbers probably reflects the dry summer in Kazakhstan.

USSR LIVESTOCK INVENTORIES ON STATE AND COLLECTIVE FARMS
AUGUST 1, 1980-1984

| Product | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| | Million Head | | | | |
| Total Cattle | 93.1 | 93.8 | 94.6 | 96.0 | 97.9 |
| Cows | 29.9 | 29.9 | 30.0 | 29.9 | 29.8 |
| Hogs | 58.0 | 58.3 | 58.2 | 61.0 | 61.8 |
| Sheep and Goats | 140.2 | 140.0 | 137.6 | 140.0 | 139.4 |
| Poultry | 707.6 | 733.7 | 756.0 | 777.0 | 786.0 |

Prepared by the USDA Interagency Task Force on the USSR Grain Situation

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1984/85

| Year | Production | Trade (Jul/Jun) Imports | Trade (Jul/Jun) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | (Million Metric Tons) | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Prelim. 1983/84 | 195 | 32.9 | 0.5 | 227 | 222 | 27 | 4 | 47 | 21 | 123 | +5 |
| Projected 1984/85 | 175 | 46.0 | 1.0 | 220 | 222 | 27 | 4 | 48 | 19 | 124 | -2 |
| | | | | | Wheat | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Prelim. 1983/84 | 78 | 20.5 | 0.5 | 98 | 95 | 15 | 1 | 36 | 9 | 34 | +3 |
| Projected 1984/85 | 78 | 24.0 | 1.0 | 101 | 101 | 15 | 1 | 37 | 8 | 40 | 0 |
| | | | | | Coarse Grains | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Prelim. 1983/84 | 105 | 11.5 | -- | 116 | 114 | 11 | 3 | 7 | 11 | 82 | +2 |
| Projected 1984/85 | 86 | 21.0 | -- | 107 | 109 | 11 | 3 | 7 | 10 | 78 | -2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.

USSR Grain Area, Yield, and Production
1975-1980,
1981-1982 (Preliminary), 1983 (Estimate)
and 1984 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
|---|---|---|---|
| Wheat | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Estimate) | 50.0 | 1.56 | 78.0 |
| 1984 (Forecast) | 52.7 | 1.48 | 78.0 |
| Coarse Grains 2/ | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Estimate) | 62.1 | 1.69 | 105.0 |
| 1984 (Forecast) | 58.4 | 1.47 | 86.0 |
| Total Grain 3/ | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Estimate) | 120.8 | 1.61 | 195.0 |
| 1984 (Forecast) | 120.0 | 1.46 | 175.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | -- | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
| Jul-Sep | --- | 2,235 | --- | 45 | 1,773 | 4,053 | 5,100 |
| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 326 | 838 | 2,308 | |
| February | 944 | 36 | 346 | 362 | 1,030 | 2,718 | |
| March | 1,521 | 18 | 250 | 350 | 1,018 | 3,157 | |
| Jan-Mar | 3,328 | 79 | 852 | 1,038 | 2,886 | 8,183 | 9,000 |
| April | 1,806 | 421 | 376 | 400 3/ | 636 | 3,639 | |
| May | 1,232 | 879 | 312 | 283 3/ | 933 | 3,639 | |
| June | 255 | 1,124 | --- | 155 3/ | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 838 3/ | 2,181 | 9,424 | 9,700 |
| July | 259 | 1,480 | 58 | 250 3/ | 611 | 2,658 | |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

USSR: Clean Fallow Area

--Million Hectares--

| Year | Total Grain Area | Clean Fallow |
|---|---|---|
| 1940 | 110.7 | 28.9 |
| 1965 | 128.0 | 14.7 |
| 1970 | 119.3 | 18.4 |
| 1975 | 127.9 | 11.2 |
| 1976 | 127.8 | 11.7 |
| 1977 | 130.4 | 12.4 |
| 1978 | 128.5 | 12.4 |
| 1979 | 126.4 | 13.4 |
| 1980 | 126.6 | 13.8 |
| 1981 | 125.5 | 16.4 |
| 1982 | 123.0 | 17.4 |
| 1983 Prelimary | 120.8 | 20.5 |
| 1984 Forecast | 120.0 | 21.0-21.5 |

Source: Official Soviet Data.

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CURRENT SERIAL RECORD

SG-12-84
October 12, 1984

## The USSR Grain Situation And Outlook

Over the month, there have been growing indications that the 1984 Soviet grain outturn could be lower than previously forecast. Production estimates have been revised downward accordingly. Heavy Soviet grain commitments for the July-December 1984 period, combined with a large July-September shipping program, point to a likely record level of Soviet grain imports, currently forecast to reach 50 million tons, 4 million tons above last month's estimate.

### Low Soviet Harvested Grain Area Points To Lower Crop

The 1984 Soviet grain harvest is estimated at 170 million tons, down 5 million from the September estimate. It includes 75 million tons of wheat--the lowest level of output since the disastrous harvest of 1975--84 million in coarse grains and 11 million in miscellaneous grains and pulses. The wheat estimate has been lowered by 3 million tons, and that for coarse grains by 2 million, while the figure for miscellaneous grains is unchanged. The reduced production estimates are the result of a smaller projected area and slightly lower yield expectations.

Analysis of the weekly harvest progress reports through October 8 clearly indicates that the crop area is smaller than previously thought. Thus, the estimated area of the 1984 crop has been reduced to 118 million hectares, down from 120 million a month ago. At 118 million hectares, the area would be virtually the same as the 117.9 million figure of 1971. From the harvest progress reports, it may be concluded that a higher-than-usual proportion of the area sown for grain has been abandoned and/or not harvested as grain. Much of the abandonment is likely the result of dry and hot weather that occurred in May and July and affected parts of eastern Eurpopean USSR, the southern Urals and northwestern Kazakhstan. In the past month, several of the more eastern regions have been experiencing harvest difficulties. The corn harvest, as well as that of the small grains, is lagging. More of the corn crop possibly is being harvested for silage rather than for grain. Yield estimates for spring wheat and barley have been reduced slightly because of the now-apparent extent of the hot, dry weather earlier in the season.

The pace of the harvest has fallen markedly since early September, as indicated by the area cut each week. The most recent harvest progress report stated that small grains and pulses had been cut on 104.6 million hectares, or 93 percent of the sown area, as of October 8, and corn for grain had been harvested from almost 2 million hectares. Weather has been a problem in parts of the northern Urals, but was generally favorable in the eastern New Lands for harvesting through most of September. Recently, however, rain and cold temperatures have occurred in some of the eastern areas where grain--primarily wheat--remained to be cut.

Fall fieldwork has progressed satisfactorily in preparation for the 1985 crop. Conditions for the newly seeded fall grains generally are more favorable than in the last several years; however, recent dry, warm weather in the southeastern Ukraine, northern North Caucausus and lower Volga Valley has not been beneficial. As of October 8, winter crops had been seeded on 35.9 million hectares, of which 31.2 million were grain. The planned area for winter grains is about 36 million hectares. Six million hectares of winter wheat is to be cultivated under "new technology," and is to provide an additional 10 million tons of output. Optimally, in southern European USSR, winter grains should be seeded by October 10. The October 8 fall plowing figure was 75 million hectares, or 67 percent of plan. This work reportedly was lagging a bit in the Ukraine, Belorussia and Moldavia.

## Soviet Grain Imports Expected To Reach Record

Soviet grain imports are forecast to reach a record 50 million tons in July-June 1984/85, 4 million tons above last month's estimate. Soviet crop problems this season, particularly with wheat quantity and quality, are likely to result in continued heavy import demand of wheat for milling purposes. The Soviet wheat and coarse grain import estimate were each raised by 2 million tons, reaching 26 million and 23 million tons, respectively, with 1 million in miscellaneous grains. Soviet total grain purchases to date strongly suggest a record import program this season. The Soviets have purchased larger quantities of wheat to date than coarse grains. The current wheat import forecast is well above last season's record and forecast coarse grain imports would approach the 25-million-ton 1981/82 record. Total purchases and the split between wheat and coarse grains in future purchasing, will depend upon prevailing market conditions and relative price relationships. Total imports for the season also will be a function of overall handling and transportation capacities. Reports indicate, however, that the Soviets have expanded and are continuing to improve their capacity to handle grain imports.

## Sales to the Soviets Continue

Over the month, Soviet grain commitments continued to increase. Additional sales of roughly 400,000 tons of U.S. wheat and corn were announced. Reported European Community wheat sales to the Soviets continued to climb, with sales to date possibly exceeding 4 million tons. There also were indications that Soviet grain trade with Eastern Europe and other Western European countries would be higher

this season than last year. Total Soviet grain commitments are estimated to be approaching 28 million tons, with the bulk apparently scheduled for shipment through December.

## Shipping Pace Strengthening

Preliminary data show a steadily increasing shipping pace in July, August and September. Available exporter data indicates about 2.4 million tons of grain going to the USSR in July, growing to over 3 million in August and likely exceeding 4 million in September. Not surprisingly, total movement for the quarter likely approach the 1981/82 record for the period. Commitments to date suggest an October-December quarter shipment level well above the 1981/82 record of nearly 10 million tons.

## Non-grain Feed Harvest Continues To Improve

The gap between this season's and last season's non-grain feed harvest results has continued to narrow. In September the production of silage moved ahead of last year's rapid pace with record production now possibile. The combined supplies of hay, haylage, silage, and grass meal--in oat unit equivalent--as of October 1 were just 4 percent below those of 1983. This compares with a 7-percent gap as of August 27, and 12 percent as of July 23.

USSR: HARVEST OF NON-GRAIN FEEDS AS OF OCTOBER 1, 1984, 1983 and 1980-82 AVERAGE 1/

| Indicator | 1984 | 1983 | 1980-82 average |
|---|---|---|---|
| | Million Tons | | |
| Hay | 65.4 | 74.7 | 59.6 |
| Haylage | 66.1 | 66.5 | 61.2 |
| Grass meal | 6.6 | 7.2 | 6.7 |
| Silage | 209.0 | 203.4 | 162.3 |

1/ Data for 1980-83 are interpolated.

## Grain Utilization Down Slightly

Despite further deterioration in grain production prospects, grain-for-feed supplies are expected to remain at about last year's level, somewhat lower than earlier expected for 1984/85. The lack of growth in grain-for-feed supplies will be partially offset by recent improvements in the non-grain feed situation. In addition, Soviet imports of tallow and inedible greases have more than doubled since 1981, to 143,000 tons in 1983. These imports are believed to be feed-grade tallow and grease used in non-ruminant livestock rations as an energy source. As such, they are a partial substitute for corn and

sorghum in the livestock diet. On the other hand, a new emphasis has been placed on production and feeding of high moisture corn as an alternative to harvesting fully mature corn. And, although high-moisture corn can be a good grain substitute for cattle, only limited use can be made of it in hog rations and none for poultry. The increased use of corn in high-moisture feeding could therefore be a factor boosting corn imports this year.

With grain-for-feed estimated at 123 million tons, total feed supplies remain the second highest on record. Thus, while growth rates for livestock production, particularly pork, are likely to slacken, feed supplies should still be sufficient to maintain livestock inventories during the current July-June year. As of September 1, livestock inventories remained at record or near record levels, with the exception of sheep and goats.

USSR LIVESTOCK INVENTORIES ON STATE AND COLLECTIVE FARMS
SEPTEMBER 1, 1980-1984

| Product | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| | Million Head | | | | |
| Total Cattle | 92.2 | 92.7 | 93.6 | 95.1 | 97.0 |
| Cows | 29.8 | 29.8 | 30.0 | 29.9 | 29.8 |
| Hogs | 58.2 | 58.6 | 59.1 | 61.8 | 62.6 |
| Sheep and Goats | 133.8 | 133.6 | 131.1 | 133.3 | 132.4 |
| Poultry | 697.8 | 720.9 | 747.0 | 764.0 | 774.7 |

Prepared by the USDA Interagency Task Force on the USSR Grain Situation

USSR Grain Area, Yield, and Production
1975-1980,
1981-1982 (Preliminary), 1983 (Estimate)
and 1984 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
|---|---|---|---|
| Wheat | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Estimate) | 50.0 | 1.56 | 78.0 |
| 1984 (Forecast) | 51.5 | 1.46 | 75.0 |
| Coarse Grains 2/ | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Estimate) | 62.1 | 1.69 | 105.0 |
| 1984 (Forecast) | 57.6 | 1.46 | 84.0 |
| Total Grain 3/ | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Estimate) | 120.8 | 1.61 | 195.0 |
| 1984 (Forecast) | 118.0 | 1.44 | 170.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | -- | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
| Jul-Sep | --- | 2,235 | --- | 45 | 1,773 | 4,053 | 5,100 |
| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 326 | 838 | 2,308 | |
| February | 944 | 36 | 346 | 362 | 1,030 | 2,718 | |
| March | 1,521 | 18 | 250 | 350 | 1,018 | 3,157 | |
| Jan-Mar | 3,328 | 79 | 852 | 1,038 | 2,886 | 8,183 | 9,000 |
| April | 1,806 | 421 | 376 | 400 3/ | 636 | 3,639 | |
| May | 1,232 | 879 | 312 | 283 3/ | 933 | 3,639 | |
| June | 255 | 1,124 | --- | 155 3/ | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 838 3/ | 2,181 | 9,424 | 9,700 |
| July | 259 | 1,480 | 58 | ---3/ | 611 | 2,408 | |
| August | 1,231 | 1,408 | 115 | N/A | 330 | 3,084 | |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.

2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.

3/ Preliminary

N/A Not Available

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1984/85

| Year | Production | Trade (Jul/Jun) Imports | Trade (Jul/Jun) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | (Million Metric Tons) | | | | | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Prelim. 1983/84 | 195 | 32.9 | 0.5 | 227 | 222 | 27 | 4 | 47 | 21 | 123 | +5 |
| Projected 1984/85 | 170 | 50.0 | 1.0 | 219 | 221 | 27 | 4 | 48 | 19 | 123 | -2 |
| | | | | | Wheat | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Prelim. 1983/84 | 78 | 20.5 | 0.5 | 98 | 95 | 15 | 1 | 36 | 9 | 34 | +3 |
| Projected 1984/85 | 75 | 26.0 | 1.0 | 100 | 100 | 15 | 1 | 37 | 8 | 39 | 0 |
| | | | | | Coarse Grains | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | -- | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | -- | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | -- | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | -- | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Prelim. 1983/84 | 105 | 11.5 | -- | 116 | 114 | 11 | 3 | 7 | 11 | 82 | +2 |
| Projected 1984/85 | 84 | 23.0 | -- | 107 | 109 | 11 | 3 | 7 | 10 | 78 | -2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.
7/ The indicated variation around the projections in this report should encompass final outcomes about two out of three times.

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grains

Approved by the World Agricultural Outlook Board • USDA

SG-13-84
November 13, 1984

## The USSR Grain Situation and Outlook

The past month has seen little change in the 1984/85 USSR grain situation. Crop and import estimates are unchanged from a month ago. Buying activity has slowed. While the pace of imports has quickened, recent shipments from the United States apparently have fallen behind schedule. Record or near record livestock inventories continue to provide a strong base for domestic grain utilization.

### Soviet Grain Import Estimate Holds

The estimate of Soviet grain imports continues at a record 50 million tons. Wheat imports are projected to reach a record 26 million tons, coarse grains--23 million and miscellaneous grains and pulses--1 million.

The pace of Soviet grain purchases slowed over the past month with modest U.S. wheat sales about the only significant business. Total committments from all origins for delivery in 1984/85 currently stand at around 30 million tons with the United States accounting for about half. News of additional USSR grain buying is expected as unconfirmed reports continue from India about possible wheat sales to the USSR. Also, this is normally the time of the year when Argentina and Australia conclude new crop wheat sales to the Soviets.

The rate of Soviet grain loadings from the major suppliers continued to accelerate in September, approaching 4.5 million tons. For the July-September quarter, imports from all origins are estimated at 11 million tons; the third largest quarterly movement on record. Wheat shipments for the quarter were likely the heaviest on record. Apparently, this high level of monthly imports is starting to have an impact on the Soviet Union's ability to handle imported grain as reports of vessel unloading delays are increasing. The Soviets are believed to have more than adequate port facilities to handle recent grain arrivals. However, the wrapup of the domestic grain harvest is still imposing heavy demands on the rail transport system, likely limiting the availability of railcars for other purposes and slowing the movement of grain away from the ports. With the finish of the harvest more railcars can now be devoted to moving imported grain.

### Soviet Wheat Imports at Record

Soviet wheat production continues to fall well short of annual requirements necessitating another year of heavy imports. Only 2 other crops in the past

two decades were smaller than the 1984 harvest--estimated at 75 million tons. Consequently, Soviet wheat supplies are still likely to be relatively tight even with wheat imports for July-June 1984/85 projected at a record 26 million tons.

The 1984 spring wheat crop, the mainstay of the Soviet milling industry was thought to be particularly hard hit this year. The 1984 winter wheat crop also suffered both in quantity produced and in quality. Consequently, even with this year's reduced wheat crop, more of the lower quality wheat is expected to be fed.

The heavy, early season wheat imports may have reflected wheat's attractive prices relative to imported coarse grains. In addition, the Soviets likely decided to meet more of their milling requirements with imported wheat while diverting additional quantities of domestically produced wheat into feed. Preliminary indications for the July-October period suggest that Soviet wheat imports have already exceeded 12 million tons, nearly half the annual import estimate. This contrasts sharply with the more traditional Soviet wheat import pattern of significantly heavier wheat imports during the second half of the marketing year.

The United States has been the dominant wheat seller so far with sales already in excess of 6 million tons. Canada and the EC are thought to have sold 8-9 million tons. The Soviets have yet to make significant purchases of new-crop Southern Hemisphere wheat. However, reports indicate a number of small sales by various countries. So far there have been no confirmed sales of wheat flour to the Soviets for 1984/85 delivery.

## Coarse Grain Imports Heavy

The 1984/85 coarse grain situation represents a sharp reversal from a year ago when a bumper coarse grain harvest permitted the Soviets to limit coarse grain imports to levels required under various agreements and to still expand usage and likely add to stocks. The 1984 Soviet coarse grain harvest is projected at 84 million tons, down 20 percent from last year's outturn. Barley production, the Soviet's most important coarse grain, is estimated to be down sharply from last year's outstanding crop. The 1984 corn crop, although down from the level of the past two years, is still well above the crops of other recent years. More of this year's corn crop was harvested for silage. In addition, production of high moisture corn was likely increased. In contrast, the Soviets appear to have harvested another good rye crop which should help meet the needs of their flour milling industry.

Soviet imports of coarse grains in 1984/85 are currently projected at 23 million tons, second only to the 25.5 million tons imported in 1981/82. Coarse grain imports during the July-September period were relatively modest as tight world coarse grain supplies and relatively favorable wheat prices may have affected Soviet purchasing decisions.

In order to offset the shortfall in production, the Soviets are expected to turn heavily to the world's coarse grain markets. Reflecting the smaller domestic corn crop and an improved level of world supplies, Soviet corn imports are expected to approach the historic high of around 15 million tons. The accelerated rate of corn purchases and shipments may reflect the Soviet's

reaction to low early season corn prices, an attempt to make up ground after a reduced July-September import program and a desire to have on hand a significant portion of their coarse grain import requirements before the traditional winter slowdown in the import program. So far during the 1984/85 July-June marketing year, U.S. corn sales to the Soviets are near 9 million tons or about two-thirds of the total. The Soviets have purchased small amounts of barley, principally from Canada and the EC. Sorghum purchases have been modest as significant buying by the Soviets will likely wait until Argentina's new crop supplies become available. Argentina would also be expected to sell the Soviets significant quantities of corn under their agreement which calls for an annual trade of 4 million tons of coarse grains. Recent reports indicate that Poland will supply the Soviets with rye in exchange for wheat.

## Outlook for Domestic Use Continues Strong

Estimated domestic use in 1984/85, including an allowance for dockage and waste, is put at 221 million tons. Grain requirements for seed and the flour milling and industrial sector are projected to continue at around 80 million tons. Dockage and waste is expected to account for around 11 percent of the harvest. Grain used as livestock feed should continue near last year's level despite the reduced 1984 harvest.

## Feed Harvest Second Best on Record

With the harvest season drawing to a close, it is now likely that non-grain feed supplies for 1984/85 will be second only to last year's record amount. In the first two weeks of October, silage production moved ahead of last year's pace, possibly aided by heavy diversion of corn originally intended for grain. Supplies of haylage and feed roots should match last year's availabilities.

Disappointing results have been recorded, however, for hay and grass meal, which will leave total non-grain feed supplies a few percentage points below those of 1983/84. Some slowdown in livestock production growth is anticipated during the first half of 1985, but barring a particularly severe winter, no serious disruptions in the livestock sector are anticipated.

## 1984 Crop Estimate Unchanged

The 1984 Soviet grain harvest continues to be estimated at 170 million tons, including 75 million wheat, 84 million coarse grains and 11 million miscellaneous grains and pulses. As noted last month, at 75 million tons wheat production would be the lowest since the disastrous harvest in 1975.

The grain area estimate also remains unchanged at 118 million hectares about the same as that for 1971 and only 2-1/2 million hectares greater than in 1960. The last Soviet report on harvest progress, as of late October, indicated that the harvest of small grains and pulses had been virtually completed and that 300,000 hectares of corn remained to be picked. Good harvest weather generally prevailed in October in European USSR, where most of the corn is grown. However, east of the Urals the latter half of the month was wet and cold and probably brought harvesting to an end.

On October 23, the Central Committee of the CPSU conducted a special plenum devoted exclusively to agriculture. The main thrust of the meeting was to improve land resources through irrigation and drainage. General Secretary Chernenko, near the end of his keynote speech, referred to the 1984 situation stating, "crops were harmed by bad weather in a number of areas and a substantial shortfall in the grain harvest will result. The situation is quite strained with the provision of feed for livestock."

Conditions this fall have been good--the best in the last 3 years--for the winter grains that will be harvested in 1985. Seeding was accomplished within the optimum time period for the most part, and the weather allowed the plants to develop normally and become properly established. Recently in northern parts of European USSR temperatures dropped to $5^{o}C$ level, causing the plants to stop growing and begin to harden prior to entering dormancy. Because temperatures in October averaged several degrees above normal, the hardening process in the north was delayed about 3 weeks and has not started in the south where the normal date for hardening to begin is about November 10. Although there are dry pockets in parts of Moldavia and the south central Ukraine where rainfall in October amounted to only 10-25 mm, it was timely falling early in the month. There is no snowcover in the north which would protect the recently hardened crops from sharp drops in temperatures.

Winter crops had been seeded on 39.1 million hectares as of October 29, including an estimated 34 million of grains. In all likelihood, these figures will increase by a million hectares, since it was reported that grain seeding had not been completed in parts of the southern Ukraine, southern North Caucasus and Central Asia. The area of winter grains seeded for the 1985 harvest likely will be slightly more than for the 1984 crop. Reportedly, 6.5 million hectares of wheat have been seeded using "intensive techniques" and is planned to raise output by 10 million tons.

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Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

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1981-1982 (Preliminary), 1983 (Estimate)
and 1984 (Forecast)

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2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1984/85

| Year | Production | Trade (Jul/Jun) Imports | Trade (Jul/Jun) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | (Million Metric Tons) | | | | | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Prelim. 1983/84 | 195 | 32.9 | 0.5 | 227 | 222 | 27 | 4 | 47 | 21 | 123 | +5 |
| Projected 1984/85 | 170 | 50.0 | 1.0 | 219 | 221 | 27 | 4 | 48 | 19 | 123 | -2 |
| | | | | | Wheat | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
| 1974/75 | 84 | 2.5 | 4.0 | 82 | 93 | 14 | 1 | 34 | 10 | 34 | -11 |
| 1975/76 | 66 | 10.1 | 0.5 | 76 | 87 | 15 | 1 | 35 | 7 | 30 | -11 |
| 1976/77 | 97 | 4.6 | 1.0 | 100 | 92 | 15 | 1 | 35 | 14 | 28 | +8 |
| 1977/78 | 92 | 6.6 | 1.0 | 98 | 108 | 15 | 1 | 35 | 14 | 44 | -10 |
| 1978/79 | 121 | 5.1 | 1.5 | 125 | 107 | 14 | 1 | 35 | 14 | 43 | +18 |
| 1979/80 | 90 | 12.0 | 0.5 | 102 | 115 | 15 | 1 | 35 | 11 | 53 | -13 |
| 1980/81 5/ | 98 | 16.0 | 0.5 | 114 | 115 | 15 | 1 | 36 | 15 | 48 | -1 |
| 1981/82 5/ 6/ | 80 | 19.5 | 0.5 | 99 | 102 | 15 | 1 | 36 | 8 | 42 | -3 |
| 1982/83 5/ 6/ | 86 | 20.2 | 0.5 | 106 | 106 | 15 | 1 | 36 | 9 | 45 | 0 |
| Prelim. 1983/84 | 78 | 20.5 | 0.5 | 98 | 95 | 15 | 1 | 36 | 9 | 34 | +3 |
| Projected 1984/85 | 75 | 26.0 | 1.0 | 100 | 100 | 15 | 1 | 37 | 8 | 39 | 0 |
| | | | | | Coarse Grains | | | | | | |
| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | — | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
| 1976/77 | 115 | 5.7 | 2.0 | 119 | 116 | 12 | 3 | 7 | 16 | 78 | +3 |
| 1977/78 | 93 | 11.7 | 1.0 | 103 | 109 | 11 | 3 | 7 | 14 | 74 | -5 |
| 1978/79 | 105 | 10.0 | 1.0 | 114 | 113 | 12 | 3 | 7 | 13 | 79 | +1 |
| 1979/80 | 81 | 18.4 | — | 100 | 100 | 12 | 3 | 7 | 10 | 68 | 0 |
| 1980/81 5/ | 81 | 18.0 | — | 99 | 100 | 11 | 3 | 7 | 12 | 67 | -1 |
| 1981/82 5/ 6/ | 72 | 25.5 | — | 98 | 99 | 11 | 3 | 7 | 7 | 71 | -1 |
| 1982/83 5/ 6/ | 86 | 11.3 | — | 97 | 98 | 11 | 3 | 7 | 9 | 68 | -1 |
| Prelim. 1983/84 | 105 | 11.5 | — | 116 | 114 | 11 | 3 | 7 | 11 | 82 | +2 |
| Projected 1984/85 | 84 | 23.0 | — | 107 | 109 | 11 | 3 | 7 | 10 | 78 | -2 |

1/ Availability excludes beginning stocks. Totals may not add due to rounding.
2/ Includes post harvest losses incurred in transport and storage.
3/ Minus indicates withdrawal from stocks.
4/ Total grain production, trade, and utilization figures include pulses, paddy rice, buckwheat, and miscellaneous grains in addition to wheat and coarse grains.
5/ Preliminary for trade, availability, utilization, and stocks change.
6/ Production estimated as there have been no official USSR production data since the 1980 crop.
7/ The indicated variation around the projections in this report should encompass final outcomes about two out of three times.

USSR Total Grain Imports 1/
By Country of Origin by months
In 1,000 Metric Tons

| | U.S. | Canada | Australia | EC | Argentina | Sub Total | Total 2/ |
|---|---|---|---|---|---|---|---|
| July 1981 | -- | 645 | 76 | 72 | 2,281 | 3,074 | |
| August | 113 | 658 | 122 | 109 | 2,377 | 3,379 | |
| September | 1,405 | 877 | 115 | 341 | 1,197 | 3,935 | |
| Jul-Sep | 1,518 | 2,180 | 313 | 522 | 5,855 | 10,388 | 10,800 |
| October | 1,262 | 1,100 | 62 | 351 | 533 | 3,308 | |
| November | 1,352 | 1,355 | --- | 461 | 111 | 3,279 | |
| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
| Oct-Dec | 4,373 | 3,001 | 103 | 904 | 652 | 9,033 | 10,000 |
| January 1982 | 1,827 | 219 | 194 | 82 | 513 | 2,835 | |
| February | 1,775 | 178 | 194 | 187 | 1,217 | 3,551 | |
| March | 2,186 | 410 | 518 | 122 | 1,079 | 4,415 | |
| Jan-Mar | 5,788 | 807 | 906 | 491 | 2,809 | 10,801 | 11,200 |
| April | 1,905 | 492 | 549 | 131 | 1,670 | 4,747 | |
| May | 1,333 | 1,471 | 507 | 102 | 1,723 | 5,136 | |
| June | 470 | 1,290 | 96 | 75 | 568 | 2,499 | |
| Apr-Jun | 3,708 | 3,253 | 1,152 | 308 | 3,961 | 12,382 | 12,800 |
| July | --- | 761 | --- | 35 | 822 | 1,618 | |
| August | --- | 650 | --- | 5 | 668 | 1,323 | |
| September | --- | 824 | --- | 5 | 283 | 1,112 | |
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| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
| November | 1,128 | 1,130 | 13 | 730 | --- | 3,001 | |
| December | 695 | 860 | 101 | 468 | 186 | 2,297 | |
| Oct-Dec | 1,967 | 3,054 | 114 | 1,500 | 254 | 6,876 | 7,500 |
| January 1983 | 1,576 | 264 | 172 | 538 | 1,355 | 3,905 | |
| February | 1,277 | 238 | 329 | 426 | 1,505 | 3,775 | |
| March | 891 | 308 | 291 | 300 | 1,082 | 2,872 | |
| Jan-Mar | 3,744 | 810 | 792 | 1,264 | 3,942 | 10,552 | 10,900 |
| April | 495 | 754 | 97 | 376 | 1,045 | 2,767 | |
| May | --- | 1,122 | --- | 258 | 1,493 | 2,873 | |
| June | --- | 863 | --- | 185 | 1,079 | 2,127 | |
| Apr-Jun | 495 | 2,739 | 97 | 819 | 3,617 | 7,767 | 8,200 |
| July | --- | 649 | --- | 120 | 399 | 1,168 | |
| August | --- | 935 | --- | 144 | 178 | 1,257 | |
| September | --- | 836 | --- | 785 | 225 | 1,846 | |
| July-Sept | --- | 2,420 | --- | 1,049 | 802 | 4,271 | 4,700 |
| October | 1,181 | 607 | --- | 156 | 268 | 2,212 | |
| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 326 | 838 | 2,308 | |
| February | 944 | 36 | 346 | 362 | 1,030 | 2,718 | |
| March | 1,521 | 18 | 250 | 350 | 1,018 | 3,157 | |
| Jan-Mar | 3,328 | 79 | 852 | 1,038 | 2,886 | 8,183 | 9,000 |
| April | 1,806 | 421 | 376 | 400 3/ | 636 | 3,639 | |
| May | 1,232 | 879 | 312 | 283 3/ | 933 | 3,639 | |
| June | 255 | 1,124 | --- | 155 3/ | 612 | 2,146 | |
| April-June | 3,293 | 2,424 | 688 | 838 3/ | 2,181 | 9,424 | 9,700 |
| July | 259 | 1,480 | 58 | 1003/ | 611 | 2,508. | |
| August | 1,231 | 1,408 | 115 | 450 | 330 | 3,534 | |
| September | 2,172 | 1,254 | 109 | 400 3/ | 294 | 4,229 | |
| July-September | 3,662 | 4,142 | 282 | 950 | 1,235 | 1,027 | 11,000 |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

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grains

Approved by the World Agricultural Outlook Board • USDA

SG-14-84
December 11, 1984

## The USSR Grain Situation and Outlook

Highlights of this month's review of the 1984/85 USSR grain outlook are:

---The Soviets appear to have more than two-thirds of their projected 1984/85 imports covered.

---The pace of Soviet grain liftings continues unseasonably heavy, although imports from the United States are lagging somewhat behind expectations.

---Prospects remain good for the 1985 Soviet winter grain crop, but in the south the crop may be more susceptible than usual to winterkill.

### Import Estimate Unchanged; Buying Continues

The estimate of Soviet grain imports for July-June 1984/85 continues at 50 million tons, including 26 million in wheat, 23 million in coarse grains, and 1 million in rice, miscellaneous grains, and pulses.

Soviet grain buying activity was relatively slow over the past month. Reports continued of a potential Indian wheat sale to the USSR of up to 2 million tons for shipment during 1985. Argentina apparently has sold in the range of 750,000-1.5 million tons of new crop wheat to the Soviets. As yet, there have been no reports of any new-crop Australian wheat sales. Total commitments from all origins for delivery in 1984/85 currently stand at around 34 million tons or over two-thirds of projected 1984/85 Soviet grain imports. Soviet wheat purchases to date are estimated at close to 21 million tons or nearly 80 percent of estimated takings for 1984/85. In contrast, Soviet coarse grain commitments at around 13 million tons, are equal to about 55 percent of the annual import projection. The Soviets have purchased very little coarse grain from the world market the past couple of months, with wheat dominating the buying activity.

The rate of USSR grain liftings from the major suppliers continued heavy in October, exceeding 4 million tons for the second consecutive month. September-October 1984 liftings likely set new records for those months. For the first 4 months of the 1984/85 marketing year, the Soviets had already lifted more than 11 million tons of wheat and 4 million of coarse grains based on reports from major suppliers.

The pace of Soviet grain imports reached record levels despite the fact that they did not meet projected shipping schedules, particularly from the United States. It appears that through October, the pace of Soviet grain liftings from the United States may be running a million tons behind expectations and appears to be falling even further behind. Among other factors, this lag may reflect Soviet difficulties in handling the large volume of imported grain scheduled for arrival at this time of year.

Domestic Use Estimate Holds

The projection of domestic grain utilization for 1984/85 remains unchanged at 221 million tons. Grain moving into livestock feed is expected to continue at last year's level of 123 million tons. Grain requirements for seed, food use and the industrial sector are projected at around 80 million tons. Dockage and waste are expected to account for around 11 percent of the 1984 harvest or about 19 million tons, reducing the useable portion of the crop to only 151 million. Even with record imports in 1984/85, the Soviets are expected to draw down stocks.

Record Livestock Inventories Likely To Tighten Feed Supplies

Total meat production on state and collective farms (liveweight) during January-October rose 6 percent to a record high for this period. Pork made the largest gain, increasing 8 percent.

For the January-October 1984 period, livestock inventories on state and collective farms were at a record high. While cow, sheep and goat inventories were down slightly from a year ago, hog, cattle, and poultry numbers were up. These record inventories, combined with the poor 1984 grain harvest, will tighten winter feed supplies. Despite the second largest forage crop on record, livestock will have to be placed on slightly reduced rations this winter. A cold winter would complicate the situation even further. Livestock productivity probably will drop in the first part of 1985. Some improvement in productivity may be seen in the second half of 1985 if next year's grain and forage crops show substantial improvement.

Meat production January-October, 1980-1984
on state and collective farms

| | 1980 | 1981 | 1982 | 1983 | 1984 |
|---|---|---|---|---|---|
| Total meat (1,000 Tons) 1/ | 12,892 | 13,165 | 13,094 | 13,922 | 14,725 |
| Beef | 4,537 | 7,596 | 7,525 | 7,838 | 8,240 |
| Pork | 3,069 | 3,162 | 3,077 | 3,420 | 3,707 |
| Sheep & goat meat | 932 | 932 | 902 | 937 | 961 |
| Poultry | 1,354 | 1,475 | 1,590 | 1,727 | 1,817 |
| Milk (1,000 Tons) | 56,064 | 54,475 | 55,369 | 59,490 | 60,405 |
| Average milk yield per cow 2/ | 1,989 | 1,929 | 1,952 | 2,099 | 2,133 |
| Eggs 3/ | 37,292 | 39,513 | 40,625 | 42,755 | 43,964 |
| Average output per laying hen 4/ | 170 | 173 | 173 | 177 | 181 |

1/ All meat on liveweight basis.
2/ Kilograms.
3/ Million pieces.
4/ Pieces

Livestock inventories November 1, 1980-84
on state and collective farms

| Year | Total Cattle | Cows | Hogs | Poultry | Sheep and goats |
|---|---|---|---|---|---|
| | --Million head-- | | | | |
| 1980 | 90.0 | 29.6 | 57.7 | 655.5 | 119.5 |
| 1981 | 90.3 | 29.7 | 57.6 | 674.2 | 119.6 |
| 1982 | 91.0 | 29.7 | 58.6 | 713.0 | 118.0 |
| 1983 | 93.1 | 29.7 | 60.8 | 728.5 | 120.2 |
| 1984 | 95.1 | 29.6 | 61.5 | 748.3 | 118.9 |

## Preliminary 1985 Plan Targets and 1984 Results

On November 26-27, the Presidium of the Supreme Soviet convened in Moscow to review the performance of the Soviet economy in 1984 and the plans for 1985. The gross value of total agricultural output was placed at about 134 billion rubles, slightly below that of 1983. No information was given about individual crops or products. The plan for 1985 calls for the value of agricultural production to reach 143 billion rubles, less than the 147 billion originally stipulated in the 1981-85 5-year plan. The agricultural sector is slated to retain its share of total investment in 1985. Again, no mention was made of targets for the various agriculture products. Grain output, according to the original plan for 1981-85, was to average 238-243 million tons and was to be 245 million in 1985.

Investment in agriculture and supporting industries is to reach 57 billion rubles. It is not clear how this figure compares with the 1984 49-billion ruble figure, since the method of calcualting capital investment changed in 1984. Fertilizer production is to increase 10.6 percent. Grain and feed crops are to receive two-thirds of the increase in fertilizer deliveries. If this target is met, fertilizer applications on grain and feed crops in 1985 will be substantially above the 1976-80 average.

## 1985 Early Crop Conditions Good

The estimated size of the 1984 Soviet grain harvest remains unchanged at 170 million tons, including 75 million wheat, 84 million coarse grains and 11 million miscellaneous grains and pulses. The area estimate of 118 million hectares is also unchanged.

While general conditions this fall have been the best in the last 3 years, the weather in November and early December probably weakened the winter grain plants that will be harvested in 1985. In northern European USSR, winter grains hardened and went into dormancy about 3 weeks later than usual. However, in the south, where winter wheat predominates, it remained warm unusually long. With good moisture, the plants continued to develop until about mid-November when temperatures plunged sharply. The warm weather had prevented formation of snowcover in the south; in the north, although slight, there was some snow. During the week of November 28 - December 4, another and more intense cold wave hit the winter grain area. It was coldest in Volga Vyatsk, along the Volga Valley and the adjacent part of the Central Black Soil Zone. Some localities had as many as six consecutive days when the average temperature was no more than -15° C. To the west, it was less cold, but during the week of November 28 - December 4, average temperatures over the entire European winter grain area were below freezing. The area

hardest hit by the low temperatures had a thin-to-adequate snow cover in the north, but only patchy cover in the south. Regarding snowcover, Byelorussia, the Ukraine, the southern half of the Central Black Soil Zone, the North Caucaus and Lower Volga Valley had none. But, in the south the plants have been weakened, thus lowering their resistance to winterkill, because they were forced into dormancy with minimal hardening. In this regard, about 15 percent of the winter wheat area was affected most. (The sudden drop in temperatures and to such low levels--down to -35° C. in Volga Vyatsk--could have a serious impact on the livestock sector.) Recently temperatures moderated and light snow fell over most of the winter grain area.

Despite the cold weather, the overall condition of the winter grains is better than in the last 3 years,--moisture supplies have been near normal and the crop was planted within the optimum period for seeding. At this point, it appears the winter grain crop has sustained little, if any, damage. Potential for the winter grain harvest in 1985 is also better because the area seeded is slightly larger than a year ago. It is estimated at 35-36 million hectares.

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Prepared by the USDA Interagency Task Force on the USSR Grain Situation.

USSR: Total Grain, Wheat, and Coarse Grains: Supply/Utilization 1972/73-1984/85

| Year | Production | Trade (Jul/Jun) Imports | Trade (Jul/Jun) Exports | Availability 1/ July/June | Total 1/ | Seed | Industrial | Food | Dockage/ Waste 2/ | Feed | Stock Change 3/ July/June |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | (Million Metric Tons) | | | | | | |
| | | | | | Total Grains 4/ | | | | | | |
| 1972/73 | 168 | 22.8 | 1.8 | 189 | 187 | 26 | 3 | 45 | 15 | 98 | +2 |
| 1973/74 | 223 | 11.3 | 6.1 | 228 | 214 | 27 | 3 | 45 | 33 | 105 | +14 |
| 1974/75 | 196 | 5.7 | 5.3 | 196 | 206 | 28 | 3 | 45 | 23 | 107 | -10 |
| 1975/76 | 140 | 26.1 | 0.7 | 166 | 180 | 28 | 3 | 45 | 14 | 89 | -14 |
| 1976/77 | 224 | 11.0 | 3.3 | 232 | 221 | 29 | 3 | 45 | 31 | 112 | +11 |
| 1977/78 | 196 | 18.9 | 2.3 | 213 | 228 | 28 | 4 | 45 | 29 | 122 | -16 |
| 1978/79 | 237 | 15.6 | 2.8 | 250 | 231 | 28 | 4 | 46 | 28 | 125 | +19 |
| 1979/80 | 179 | 31.0 | 0.8 | 209 | 222 | 28 | 4 | 46 | 22 | 123 | -13 |
| 1980/81 5/ | 189 | 34.8 | 0.5 | 223 | 225 | 27 | 4 | 47 | 28 | 119 | -2 |
| 1981/82 5/ 6/ | 160 | 46.0 | 0.5 | 206 | 210 | 27 | 4 | 47 | 16 | 116 | -4 |
| 1982/83 5/ 6/ | 180 | 32.5 | 0.5 | 212 | 213 | 27 | 4 | 47 | 18 | 117 | -1 |
| Prelim. 1983/84 | 195 | 32.9 | 0.5 | 227 | 222 | 27 | 4 | 47 | 21 | 123 | +5 |
| Projected 1984/85 | 170 | 50.0 | 1.0 | 219 | 221 | 27 | 4 | 48 | 19 | 123 | -2 |
| | | | | | Wheat | | | | | | |
| 1972/73 | 86 | 15.6 | 1.3 | 100 | 98 | 14 | 1 | 35 | 8 | 41 | +2 |
| 1973/74 | 110 | 4.5 | 5.0 | 109 | 96 | 14 | 1 | 34 | 16 | 30 | +13 |
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| 1972/73 | 72 | 6.9 | 0.4 | 79 | 79 | 11 | 2 | 7 | 7 | 53 | 0 |
| 1973/74 | 101 | 6.4 | 0.9 | 106 | 105 | 11 | 2 | 7 | 15 | 70 | +1 |
| 1974/75 | 100 | 2.7 | 1.0 | 101 | 100 | 11 | 2 | 7 | 12 | 68 | +1 |
| 1975/76 | 66 | 15.6 | -- | 81 | 84 | 12 | 2 | 7 | 7 | 56 | -3 |
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FAS, Grain and Feed Division

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| December | 1,759 | 546 | 41 | 92 | 8 | 2,446 | |
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| October | 144 | 1,064 | --- | 302 | 68 | 1,578 | |
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| November | 1,322 | 486 | --- | 427 | 155 | 2,390 | |
| December | 1,283 | 250 | 115 | 626 | 370 | 2,644 | |
| Oct-Dec | 3,786 | 1,343 | 115 | 1,209 | 793 | 7,246 | 8,600 |
| January 1984 | 863 | 25 | 256 | 333 | 838 | 2,315 | |
| February | 944 | 36 | 346 | 433 | 1,030 | 2,789 | |
| March | 1,521 | 18 | 249 | 418 | 1,018 | 3,224 | |
| Jan-Mar | 3,328 | 79 | 851 | 1,184 | 2,886 | 8,328 | 9,000 |
| April | 1,806 | 421 | 376 | 405 3/ | 868 | 3,876 | |
| May | 1,232 | 879 | 312 | 285 3/ | 933 | 3,641 | |
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| April-June | 3,293 | 2,424 | 688 | 845 3/ | 2,413 | 9,663 | 9,800 |
| July | 259 | 1,481 | 58 | 100 3/ | 286 | 2,184 | |
| August | 1,231 | 1,408 | 115 | 450 3/ | 330 | 3,534 | |
| September | 2,172 | 1,254 | 109 | 925 3/ | 293 | 4,753 | |
| July-September | 3,662 | 4,143 | 282 | 1,475 3/ | 909 | 10471 | 11,300 |
| October | 2,320 | 717 | 127 | 800 3/ | 302 | 4,266 | |

1/ Based on reported exports for countries enumerated and estimates for other countries to the USSR; excludes rice, buckwheat, millet, and other miscellaneous grains and pulses. Includes grain equivalent of flour.
2/ Partially estimated including tentative estimates for countries not enumerated, or for countries from which data is not available.
3/ Preliminary
N/A Not Available

USSR Grain Area, Yield, and Production
1975-1980,
1981-1982 (Preliminary), 1983 (Estimate)
and 1984 (Forecast)

| Grain | Area (Million Hectares) | Yield (Metric Tons Per Hectare) | Production 1/ (Million Metric Tons) |
|---|---|---|---|
| Wheat | | | |
| 1975 | 62.0 | 1.07 | 66.2 |
| 1976 | 59.5 | 1.63 | 96.9 |
| 1977 | 62.0 | 1.49 | 92.2 |
| 1978 | 62.9 | 1.92 | 120.9 |
| 1979 | 57.7 | 1.56 | 90.2 |
| 1980 | 61.5 | 1.60 | 98.2 |
| 1981 (Preliminary) | 59.2 | 1.35 | 80.0 |
| 1982 (Preliminary) | 57.3 | 1.50 | 86.0 |
| 1983 (Estimate) | 50.0 | 1.56 | 78.0 |
| 1984 (Forecast) | 51.5 | 1.46 | 75.0 |
| Coarse Grains 2/ | | | |
| 1975 | 58.1 | 1.13 | 65.8 |
| 1976 | 60.9 | 1.89 | 115.0 |
| 1977 | 60.6 | 1.53 | 92.6 |
| 1978 | 58.0 | 1.82 | 105.4 |
| 1979 | 61.2 | 1.33 | 81.2 |
| 1980 | 57.9 | 1.40 | 80.5 |
| 1981 (Preliminary) | 58.0 | 1.24 | 72.0 |
| 1982 (Preliminary) | 58.0 | 1.48 | 86.0 |
| 1983 (Estimate) | 62.1 | 1.69 | 105.0 |
| 1984 (Forecast) | 57.6 | 1.46 | 84.0 |
| Total Grain 3/ | | | |
| 1975 | 127.9 | 1.10 | 140.1 |
| 1976 | 127.8 | 1.75 | 223.8 |
| 1977 | 130.3 | 1.50 | 195.7 |
| 1978 | 128.5 | 1.85 | 237.4 |
| 1979 | 126.4 | 1.42 | 179.2 |
| 1980 | 126.6 | 1.49 | 189.1 |
| 1981 (Preliminary) | 125.5 | 1.27 | 160.0 |
| 1982 (Preliminary) | 123.0 | 1.46 | 180.0 |
| 1983 (Estimate) | 120.8 | 1.61 | 195.0 |
| 1984 (Forecast) | 118.0 | 1.44 | 170.0 |

1/ "Bunker weight" basis; not discounted for excess moisture or foreign material.
2/ Includes rye, barley, oats, corn, sorghum, and millet.
3/ Includes wheat, coarse grains, pulses, rice, buckwheat, and miscellaneous grains.

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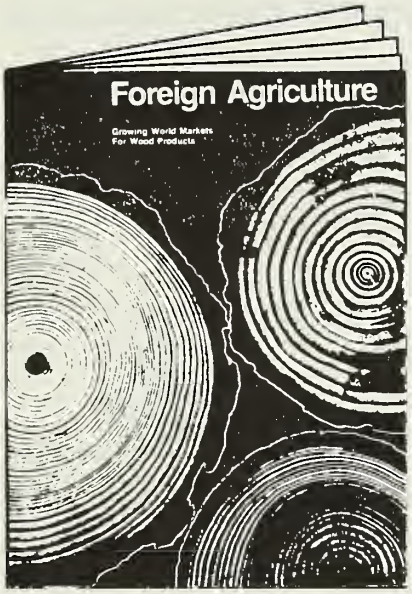


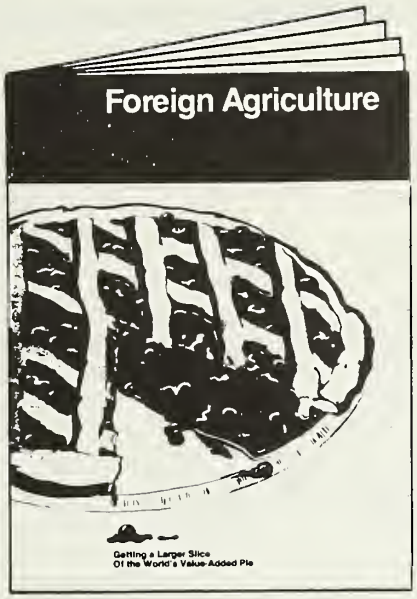

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